# USING PPL'S WEB PORTAL:
## A GUIDE FOR SOCIAL WORKERS

## I. Introduction

The PPL Web Portal is an online system for participant information, worker information and customer service history. As a key member of the support team for people in Golden Gate Regional Center Participant-Directed Program, you will have view access to most areas of the PPL Web Portal. This document provides instructions for completing basic tasks and navigating between screens. Below are the items that this document reviews.

**The login for the www.publicpartnerships.com site is username GGRC and password GGRCPPL34. It also has a link to the PPL Web Portal (more info below).**

## Contents



**How to contact PPL:**

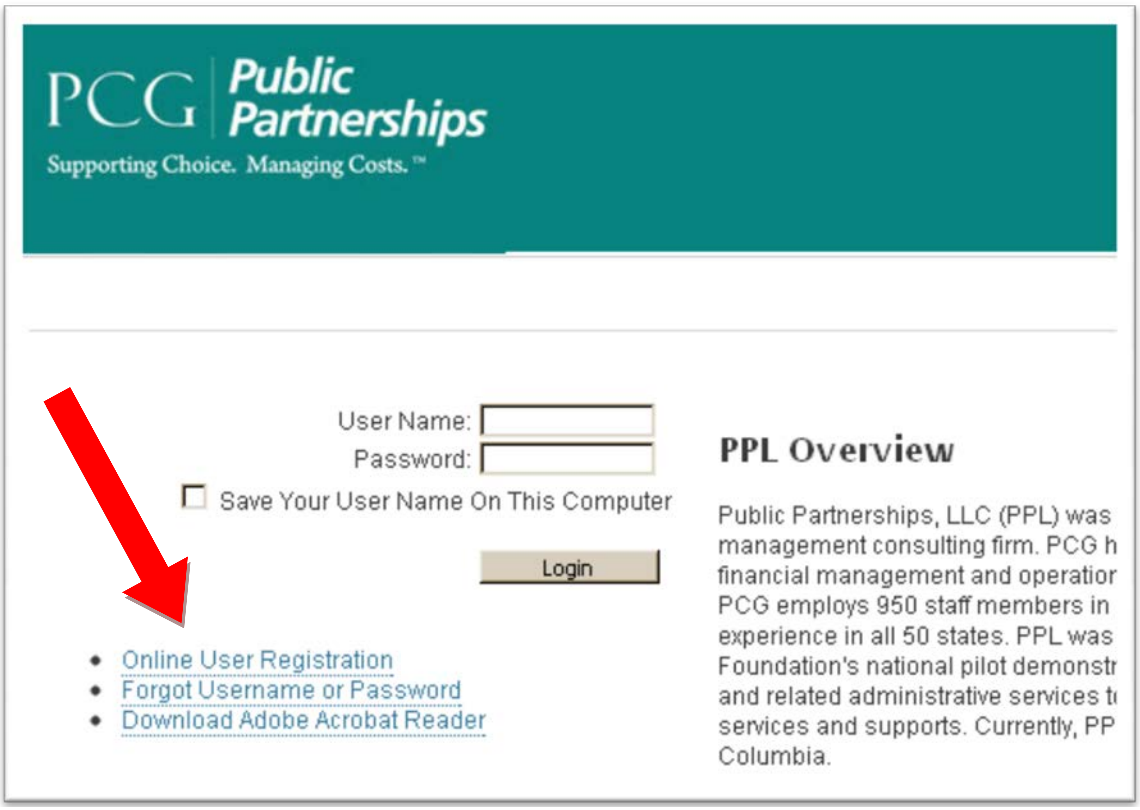
| | | | |
|---|---|---|---|
| **Phone (English)** | (877)-522-1053 | **Administrative Fax:** | (855)-867-1676 |
| **Phone (Cantonese)** | (877)-522-1055 | **Timesheet Fax:** | (855)-597-3876 |
| **Phone (Spanish)** | (877)-522-1054 | **TTY:** | (800)-360-5899 |
| **Email:** | CAGGRC@pcgus.com | **Web:** | www.publicpartnerships.com |

## II. Registering for a Username

### First Time Log-in

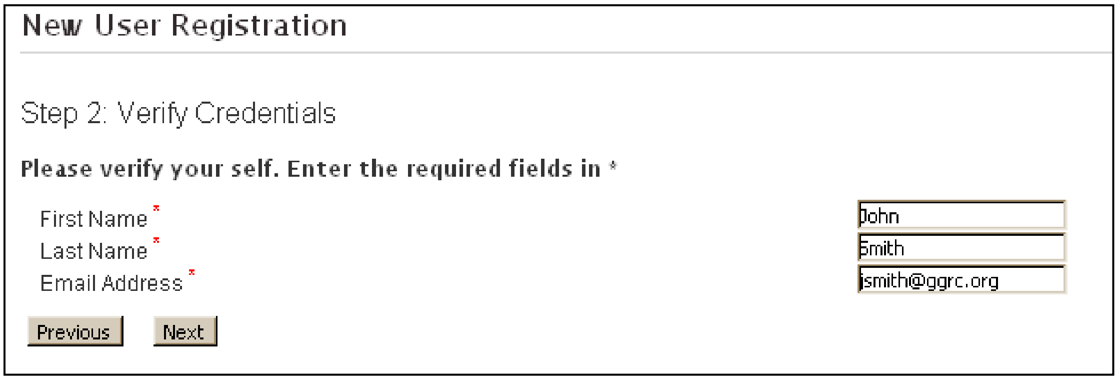
1. You must register for the Web Portal the first time you access the site: https://fms.publicpartnerships.com/PPLPortal/login.aspx.

2. Click on "Online User Registration".

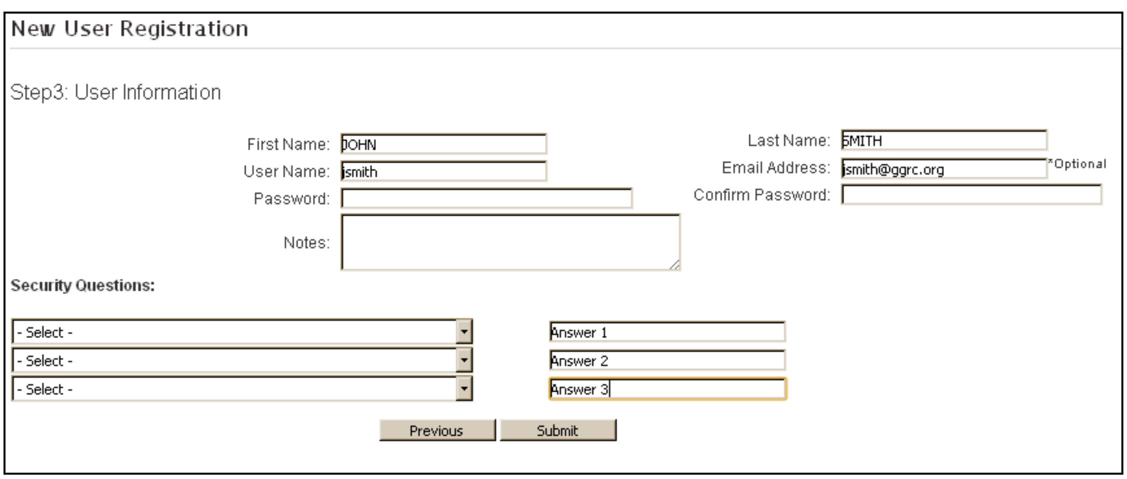



3. You will see the New User Registration Screen – Step 1
   a. Select "California" for the State
   b. Select "CA GGRC" for your program
   c. Select "Social Worker" or "GGRC Admin" for your Role
   d. Click Next

4. You will be taken to the New User Registration Screen – Step 2
    a. Enter your First and Last Name
    b. Enter your GGRC ("@ggrc.org") email address
    c. Click Next




5. You will see the final New User Registration Screen – Step 3
    a. Make sure your first and last name are correct
    b. Enter a username. This should be First initial, last name.
       *Example: John Smith is "jsmith".*
        - If your username is unavailable try entering your middle initial as well. *"j**w**smith"*
    c. Enter your GGRC ("@ggrc.org") email address
    d. Choose a password. It should be at least 6 characters long and include both letters and numbers.
    e. Choose 3 security questions from the drop down menus and provide an answer to each.
    f. Click Submit




***You are ready to log in!***

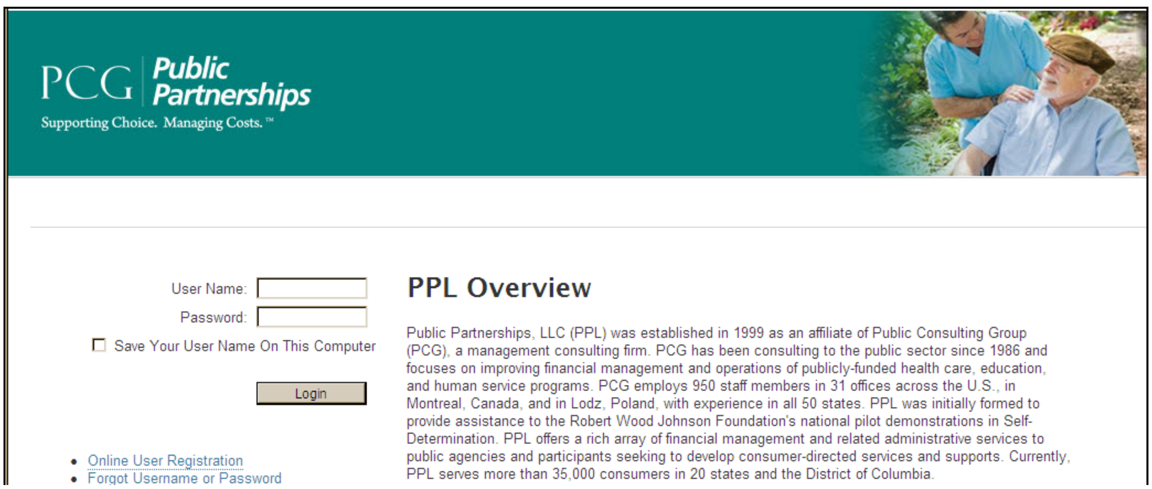
## III. Logging into Portal

*Once you've gone through the first time Log In process, you can follow the below steps for PPL Web Portal access.*

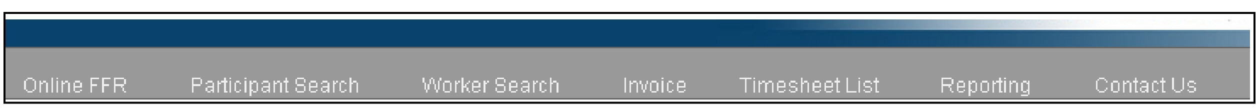
The PPL Web Portal will allow social workers and GGRC Staff to access the system. Usernames and passwords should not be shared to protect the confidentiality of the information kept in the PPL Web Portal.

1. Go to https://fms.publicpartnerships.com/PPLPortal/login.aspx

2. Enter your user name and password and click Login.




3. Once you log in, the first screen you will see a series of menu options near the top of the screen:




   a. Online FFR
   b. Participant Search
   c. Worker Search
   d. Invoice
   e. Timesheet List
   f. Reporting
   g. Contact Us

## IV. Online FFR

The Online FFR (Family Friendly Report) allows real time, up to date reporting on budget utilization.

**Step 1:**

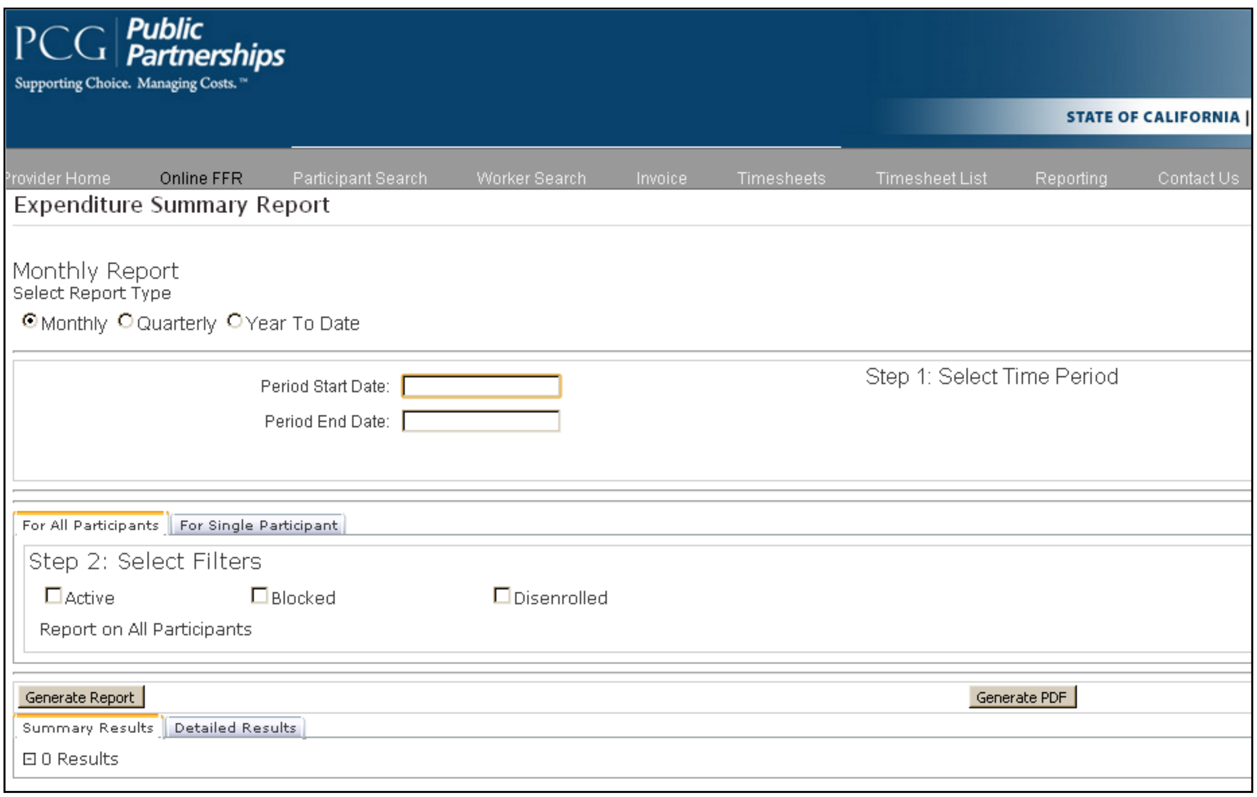
1. Select the time period for the report: Monthly, Quarterly, or Fiscal Year to Date.
2. Enter the Period Start and End dates of the report. *(You will not have this option for Year to Date)*

**Step 2:**

1. If you would like to filter this report to include only Active, Blocked or Disenrollled Participants you can select the filter boxe(s) in Step 2. If no filters are applied, the search results will return all participants with an auth in the specified time period.
2. You can also search by individual participants if you select the "For Single Participant" tab

**Step 3:**

1. Click "Generate Report"
2. You have the option of seeing an overview of all services, or a "Detailed Results" Page that will show all services authorized for the returned individuals.



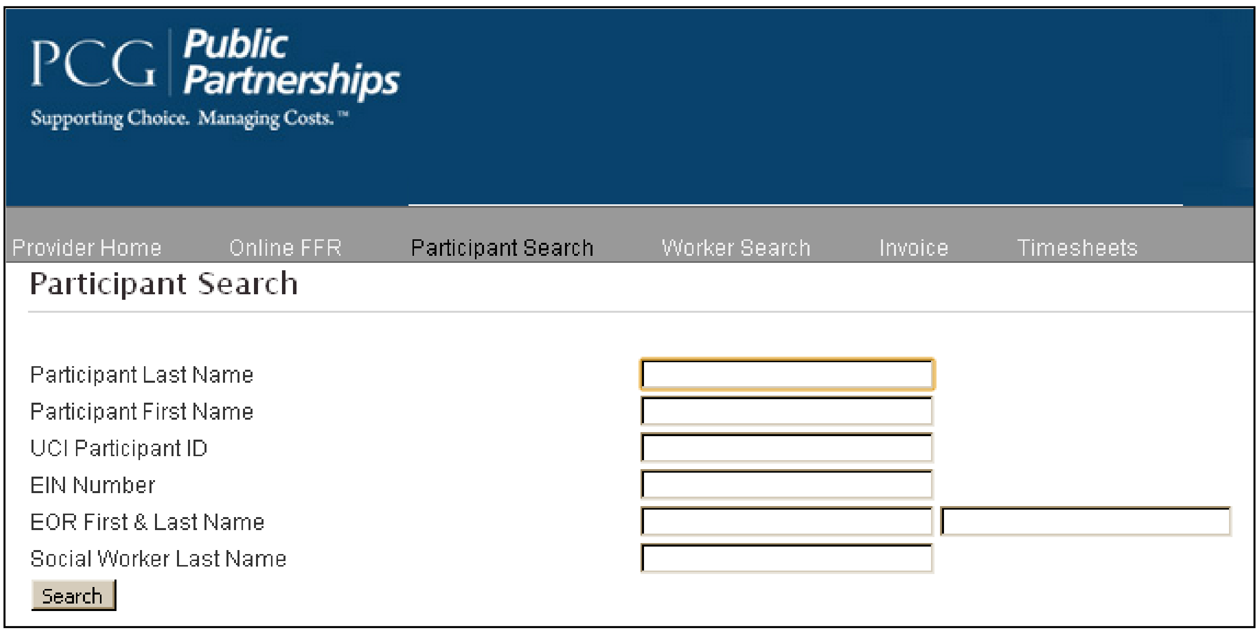
## V. Participant Search

**Looking Up and Reviewing Participant Information**

1. You can look up participants in a variety of ways. Here are some tips:

    a. You do not have to enter a value in every (or any) field. To see all the participants, just hit "search."

    b. You do not have to enter in the entire field. For example, you do not need to enter 'Smith' in last name. You can enter 'Smi' and it will bring up all members with a last name starting with 'Smi'

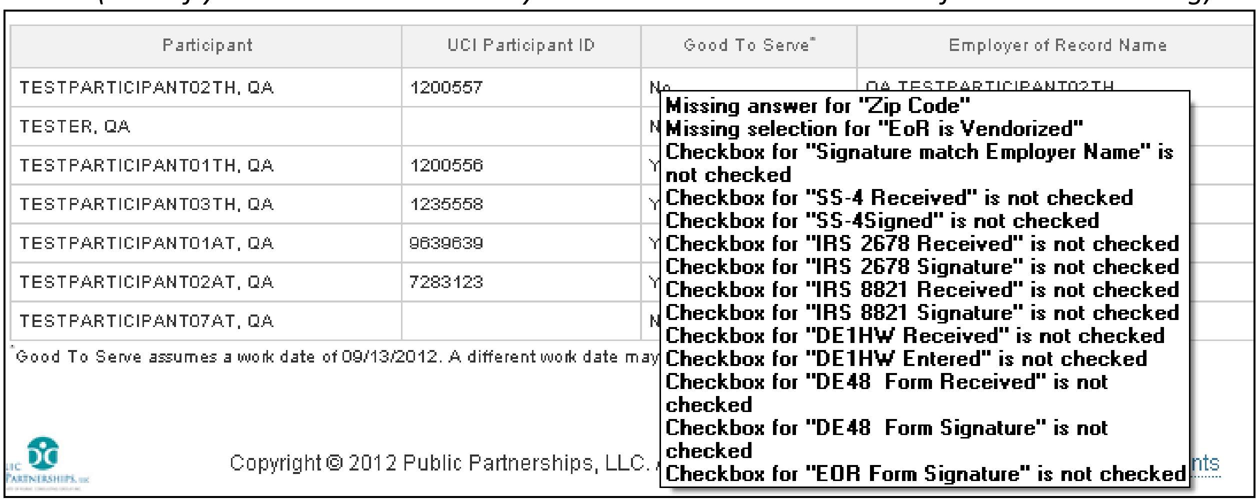


**Participant Search Results**

1. After clicking the Search button, the PPL Web Portal will display a list of found participants.

2. The list of found participants includes basic demographic information about the participant. These include:
    a. The  Participant's Name
    b. The Participant's UCI number
    c. The Participant's "Good to Serve Status"

*(Hint: If you hover over the "No" you can see what materials or information is missing)*



| Participant | UCI Participant ID | Good To Serve* | Employer of Record Name |
|---|---|---|---|
| TESTPARTICIPANT02TH, QA | 1200557 | No | QA TESTPARTICIPANT02TH |
| TESTER, QA | | N | |
| TESTPARTICIPANT01TH, QA | 1200556 | Y | |
| TESTPARTICIPANT03TH, QA | 1235558 | Y | |
| TESTPARTICIPANT01AT, QA | 9639639 | Y | |
| TESTPARTICIPANT02AT, QA | 7283123 | Y | |
| TESTPARTICIPANT07AT, QA | | N | |

*Good To Serve assumes a work date of 09/13/2012. A different work date may

Missing answer for "Zip Code"
Missing selection for "EoR is Vendorized"
Checkbox for "Signature match Employer Name" is not checked
Checkbox for "SS-4 Received" is not checked
Checkbox for "SS-4Signed" is not checked
Checkbox for "IRS 2678 Received" is not checked
Checkbox for "IRS 2678 Signature" is not checked
Checkbox for "IRS 8821 Received" is not checked
Checkbox for "IRS 8821 Signature" is not checked
Checkbox for "DE1HW Received" is not checked
Checkbox for "DE1HW Entered" is not checked
Checkbox for "DE48  Form Received" is not checked
Checkbox for "DE48  Form Signature" is not checked
Checkbox for "EOR Form Signature" is not checked

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<ol start="4" type="a" style="list-style:none">
</ol>

    d. The Employer's Name
    e. The EIN number associate with the Employer
    f. The Social Worker assigned to the Participant
    g. The Employer's phone number
    h. A link to the Participant's Profile

## VI.Participant Profile

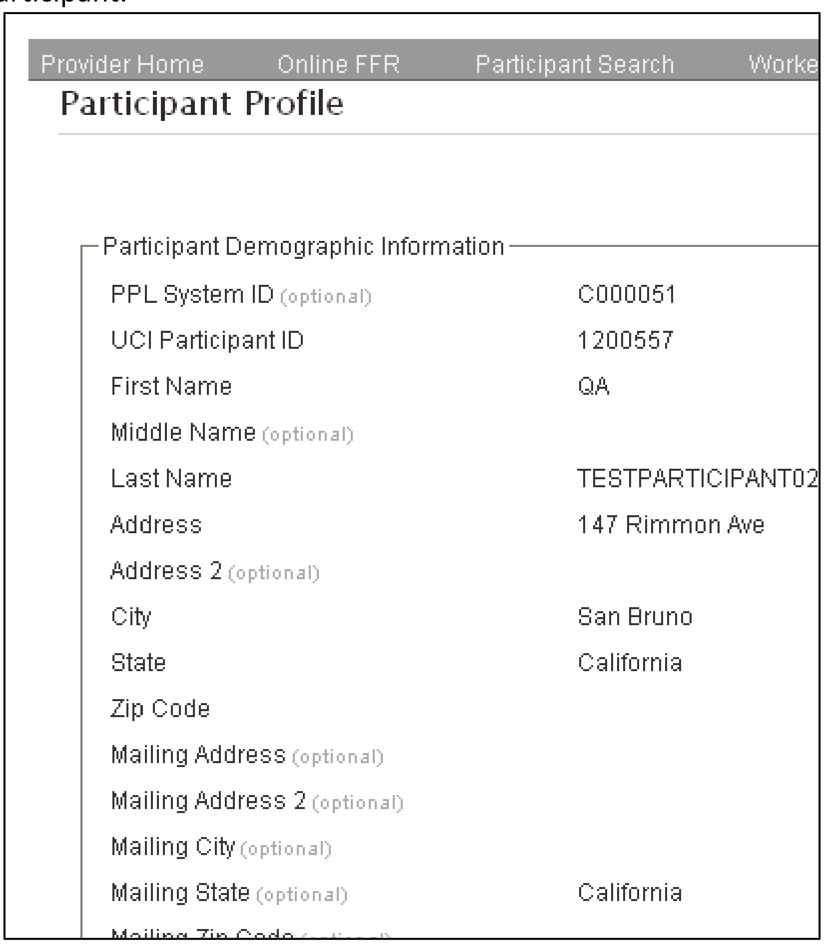
**Viewing the Detailed Participant Profile**

1. Selecting Participant Profile will allow you to review an individual participant's detailed record. You do this by clicking the Participant Profile link on the right hand side of the page.

| of Record Name | Employer No | Social Worker | Phone | Participant Profile |
|---|---|---|---|---|
| ANT02TH | 03-3126678 | QA TESTSERVICECOORDINATOR1 | 415-333-1234 | Participant Profile |

2. There are four sections in the first page of the participant's profile: **Participant Demographic Information, Employer of Record, Authorized Representative and Social Worker.**

   a. **Participant Demographic Information** contains basic information about the participant.



b. The Employer of Record section contains information about the individual serving as the employer of record. This may be the participant themselves or the Vendorized Family Member.

**Employer of Record**

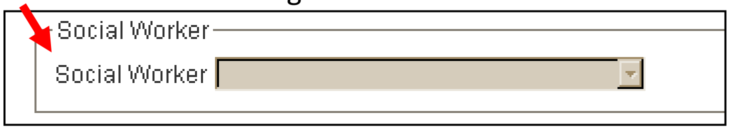
| | |
|---|---|
| Employer ID Number (EIN) | 03-3126678 |
| First Name | QA |
| Middle Name (optional) | |
| Last Name | TESTPARTICIPANT02 |
| Driver's License Number (optional) | |
| Date EOR Forms Printed & Mailed (optional) | |
| Employer Address | 147 Rimmon Ave |
| Employer Address 2 (optional) | |
| Employer City | San Bruno |
| Employer State | California |
| Employer Zip Code | 94066 |
| Phone Number (optional) | 415-333-1234 |
| Employer SSN | 056881234 |
| Relationship to Participant (optional) | OTHER |

c. The Authorized Representative section contains information about an individual who may serve as a contact for the participant. In some instances, the participant and Employer would like to record someone else as a contact in case they are not available. This individual does not have an official role in the program; it is just handy to have another place to record contact information.

**Authorized Representative**

| |
|---|
| First Name (optional) |
| Middle Name (optional) |
| Last Name (optional) |
| Phone (optional) |
| Email (optional) |
| Relationship To Participant (optional) |

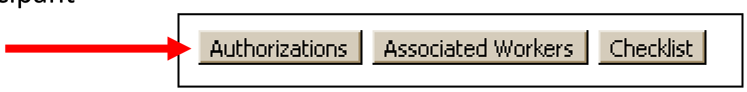
c. The Social Worker section lists the name of the participant's Social Worker.
   i. It is important to note that you will be able to see participant in other Social Worker's case load. This was done to allow you to act as back-up resources if a colleague is out of the office.




**Participant Profile Options**

One the very bottom of the Participant Profile there are three buttons available. **Authorizations, Associated Workers** and **Checklist**.

1. The Authorization button takes you to the budget and authorization page for that participant

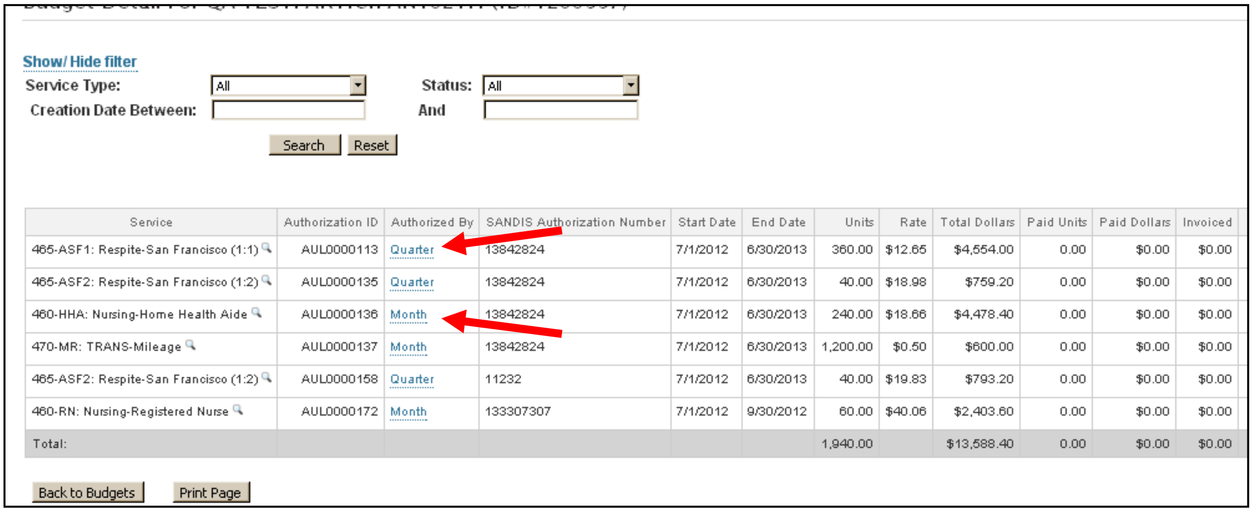



   a. The screen you will see is the budget summary page. This lists all the budget periods that the participant had/has an active auth in.


| Id | Start | End | Detail | Action |
|---|---|---|---|---|
| 3580000 | 7/1/2012 | 6/30/2013 | Budget Detail | |

   b. If you click the Budget Detail hyperlink, you will be shown the active authorizations for that particular budget period.
   c. You have the ability to filter by service type and creation date
   d. The services and subcodes will be listed on the left:

e. If you click the "Quarter" or "Month" hyperlink, you can see the details from quarter to quarter or month to month respectively.


Show/ Hide filter

Service Type: All  Status: All

Creation Date Between:  And

Search  Reset

| Service | Authorization ID | Authorized By | SANDIS Authorization Number | Start Date | End Date | Units | Rate | Total Dollars | Paid Units | Paid Dollars | Invoiced |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 465-ASF1: Respite-San Francisco (1:1) | AUL0000113 | Quarter | 13842824 | 7/1/2012 | 6/30/2013 | 360.00 | $12.65 | $4,554.00 | 0.00 | $0.00 | $0.00 |
| 465-ASF2: Respite-San Francisco (1:2) | AUL0000135 | Quarter | 13842824 | 7/1/2012 | 6/30/2013 | 40.00 | $18.98 | $759.20 | 0.00 | $0.00 | $0.00 |
| 460-HHA: Nursing-Home Health Aide | AUL0000136 | Month | 13842824 | 7/1/2012 | 6/30/2013 | 240.00 | $18.66 | $4,478.40 | 0.00 | $0.00 | $0.00 |
| 470-MR: TRANS-Mileage | AUL0000137 | Month | 13842824 | 7/1/2012 | 6/30/2013 | 1,200.00 | $0.50 | $600.00 | 0.00 | $0.00 | $0.00 |
| 465-ASF2: Respite-San Francisco (1:2) | AUL0000158 | Quarter | 11232 | 7/1/2012 | 6/30/2013 | 40.00 | $19.83 | $793.20 | 0.00 | $0.00 | $0.00 |
| 460-RN: Nursing-Registered Nurse | AUL0000172 | Month | 133307307 | 7/1/2012 | 9/30/2012 | 60.00 | $40.06 | $2,403.60 | 0.00 | $0.00 | $0.00 |
| Total: | | | | | | 1,940.00 | | $13,588.40 | 0.00 | $0.00 | $0.00 |

Back to Budgets  Print Page

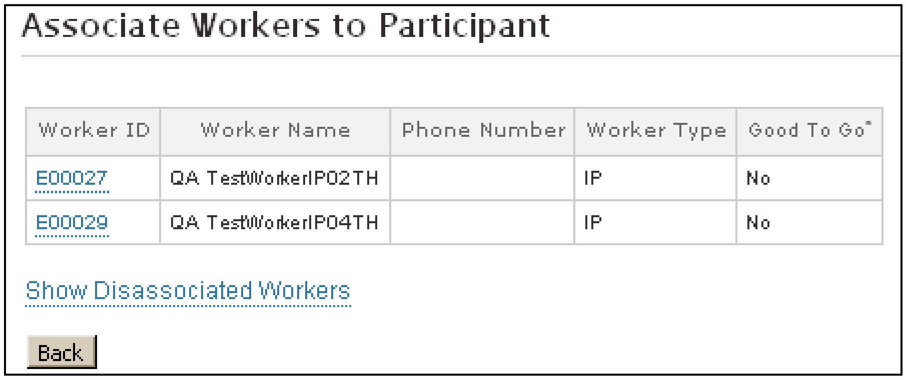
2. The Associated Workers button on the bottom of the main Participant Profile page takes you to information on the workers employed by the participant and allows you to see the status of paperwork received.


a. After selecting Associated Workers, you will see a list of the participant's associated workers.

b. PPL Financial Operations staff will associate or disassociate workers to a participant upon receipt of the worker's application packet. You can also see if the worker is ready to provide services – Good to Go. If 'Good to Go' is set to no, you can hover over the listing and it will indicate what is missing.

- *Note: <u>"Missing answer"</u> denotes missing Demographics information in the Participant Profile page. <u>"Checkbox"</u> denotes a missing form.*

c. If you wish to view the Worker Profile Page click the Worker ID hyperlink. (There will be more information on the Worker Profile under the Worker Profile Section.)



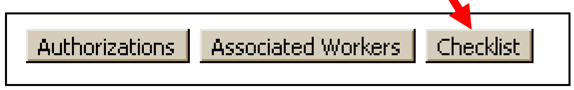
Associate Workers to Participant

| Worker ID | Worker Name | Phone Number | Worker Type | Good To Go* |
|---|---|---|---|---|
| E00027 | QA TestWorkerIP02TH | | IP | No |
| E00029 | QA TestWorkerIP04TH | | IP | No |

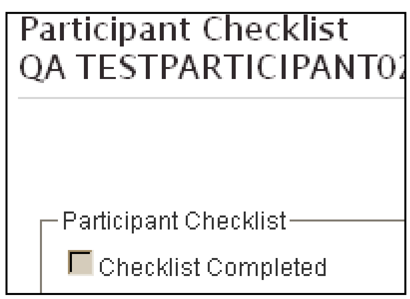
Show Disassociated Workers

Back

3. The Checklist feature on the bottom of the Participant Profile Page tells you what forms have been received and processed by PPL and what forms the Employer is currently missing.




a. The top of the Participant Checklist screen shows a checkbox and the wording, 'Checklist Completed.' This box remains unchecked until all of the items required for training and paperwork are completed on the Participant Checklist screen. Once the items are completed, the box will automatically appear checked.



b. The right side of the Participant Checklist may have items listed in red. These are the remaining required checklist items that need to be completed in order for the participant's checklist to be complete.
   i. You may notice the same form listed multiple times. PPL will track if it is received and also if it is signed and completed correctly.

**The following items must be completed:**

Missing selection for "EoR is Vendorized"
Checkbox for "Signature match Employer Name" is not checked
Checkbox for "SS-4 Received" is not checked
Checkbox for "SS-4Signed" is not checked
Checkbox for "IRS 2678 Received" is not checked
Checkbox for "IRS 2678 Signature" is not checked
Checkbox for "IRS 8821 Received" is not checked
Checkbox for "IRS 8821 Signature" is not checked
Checkbox for "DE1HW Received" is not checked
Checkbox for "DE1HW Entered" is not checked
Checkbox for "DE48 Form Received" is not checked
Checkbox for "DE48 Form Signature" is not checked
Checkbox for "EOR Form Signature" is not checked

c. The left hand side of the Participant Checklist records the enrollment paperwork required. This information is completed by PPL's upon receipt of the Employer forms.

IRS SS-4
SS-4 Received
SS-4 County Box 6 Completed (optional)
SS-4Signed
SS-4 Date (optional)

IRS 2678
IRS 2678 Received
IRS 2678 Signature
IRS 2678 Date (optional)
Appointed Agent of Employer by IRS (optional)

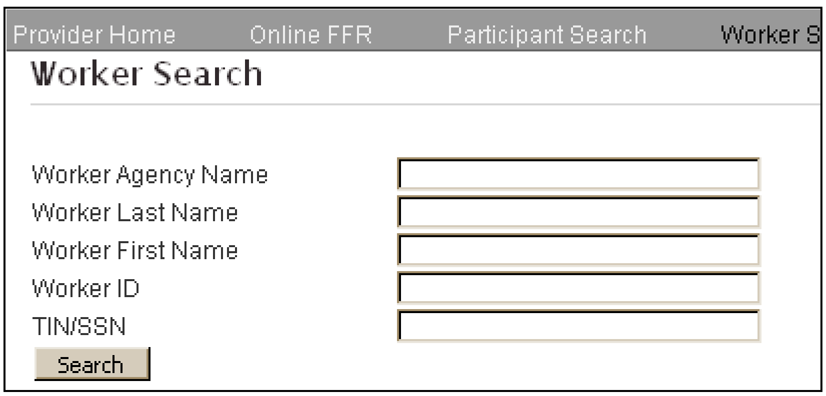
IRS 8821

## VII. Worker Search

1. You can look up worker a variety of ways. You can search by Worker's Last Name, First name, PPL Employee ID or SSN. Currently there are no agencies in the GGRC program so the Worker Agency Name will not be used.

    a. Like the Participant search, you do not have to enter a value in every (or any) field. To see all the Workers, just hit "search."

    b. You do not have to enter in the entire field. For example, you do not need to enter 'Smith' in last name. You can enter 'Smi' and it will bring up all members with a last name starting with 'Smi'




2. The returned search results have an Action Column on the left that will take you to that worker's profile ("View") or to a list of the timesheets submitted by that worker ("View Timesheets")

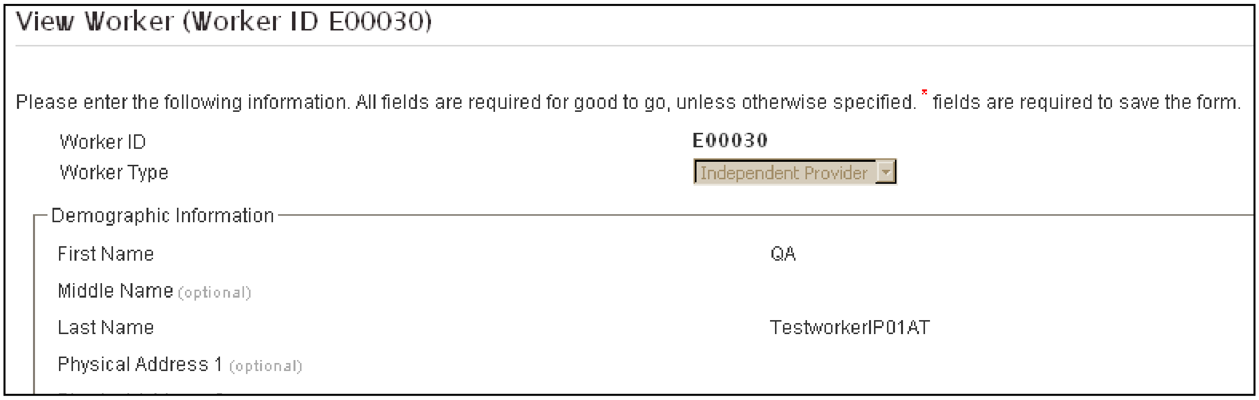
| Action | Worker ID | Worker Name | Worker First Name | Worker Last Name | Worker Type | Service Type | City | Zip Code |
|---|---|---|---|---|---|---|---|---|
| View View Timesheets | E00026 | QA TestWorkerIP01TH | QA | TestWorkerIP01TH | IP | Respite-SM&M (1:1), Respite-SM&M (1:2), TRANS-Mileage, TRANS-Mileage | | |

    a. The results also show the PPL Employee ID
    b. Worker Full Name
    c. Worker First Name
    d. Worker Last Name
    e. The type of worker. All workers will be IP's in this program.
    f. The services they are authorized to perform
    g. Worker's City
    h. Worker's Zip

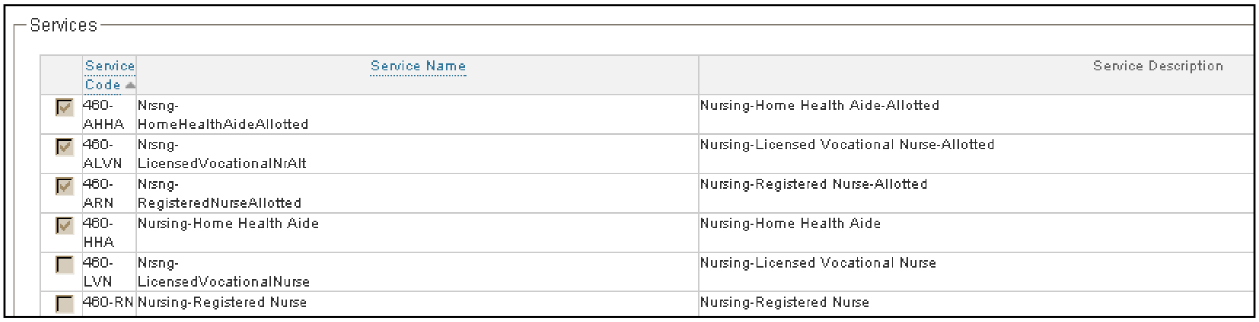
# VIII. Worker Profile

1. There are three sections in the worker's profile: Demographic Information, Services, and Program Checklist.

    a. Demographic Information contains basic information about the worker. This information is entered by PPL Financial Operations upon receipt of worker paperwork.




    b. The Services section is a checklist completed by PPL Financial Operations staff. It records the services that the worker is approved to provide.

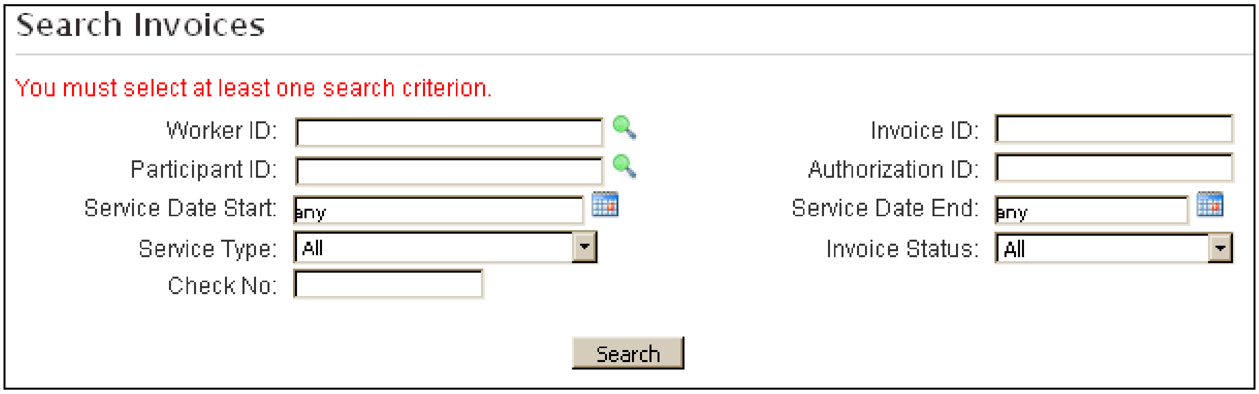

Services

| | Service Code | Service Name | Service Description |
|---|---|---|---|
| ☑ | 460-AHHA | Nrsng-HomeHealthAideAllotted | Nursing-Home Health Aide-Allotted |
| ☑ | 460-ALVN | Nrsng-LicensedVocationalNrAlt | Nursing-Licensed Vocational Nurse-Allotted |
| ☑ | 460-ARN | Nrsng-RegisteredNurseAllotted | Nursing-Registered Nurse-Allotted |
| ☑ | 460-HHA | Nursing-Home Health Aide | Nursing-Home Health Aide |
| ☐ | 460-LVN | Nrsng-LicensedVocationalNurse | Nursing-Licensed Vocational Nurse |
| ☐ | 460-RN | Nursing-Registered Nurse | Nursing-Registered Nurse |

    c. The Program Checklist section tells you at a glance if all required worker paperwork has been received. For a more detailed view, go to the section "Checking Good to Go"

# IX. Invoices

1. The Invoice tab lets you search and view any submitted, paid, or pending, invoices.
   - You must select at least one search criteria


Search Invoices

You must select at least one search criterion.

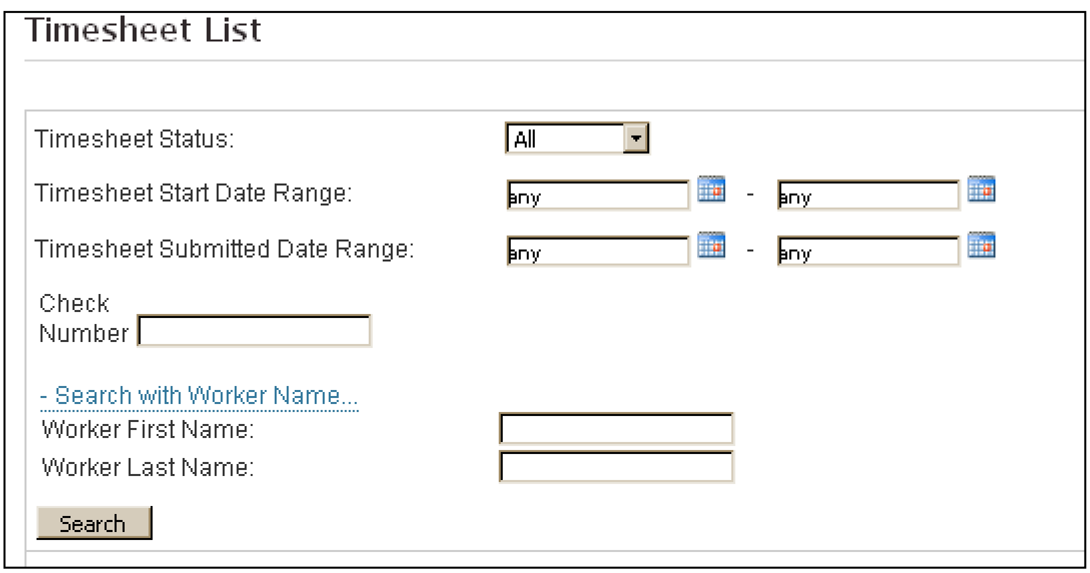
Worker ID:
Participant ID:
Service Date Start: any
Service Type: All
Check No:
Invoice ID:
Authorization ID:
Service Date End: any
Invoice Status: All

Search

# X. Timesheets

1. The Timesheet tab lets you search and view any submitted, paid, or pending, invoices.

2. You can search timesheets by:
   a. Status (Submitted, Paid, pending etc)
   b. Specifying a date range for days worked
   c. Specifying a Date range for when the timesheets were submitted
   d. A Check number (only paid timesheets)
   e. Worker's First and/or Last name


Timesheet List

Timesheet Status: All
Timesheet Start Date Range: any - any
Timesheet Submitted Date Range: any - any
Check Number

- Search with Worker Name...
Worker First Name:
Worker Last Name:

Search

# XI. Reporting

1. The Reporting Site offers many customizable reporting options to help you manage your caseload and find quick comprehensive answers

# XII. Contact Us

1. Questions? Comments? Feel free to use our Contact Us page on the Portal or give Customer Service a call at:

   **Phone (English)** **(877)-522-1053**
   **Phone (Cantonese)** **(877)-522-1055**
   **Phone (Spanish)** **(877)-522-1054**

# XIII. Checking Good to Go

**Confirm if the participant is ready to start! Checking "Good to Go" Status**

Before a worker can begin working for a participant in the **GGRC participant-directed program**, they both need to submit all required forms and be approved in the Web Portal. Once the participant has completed all necessary forms and provided the necessary demographic information they will be "Good to Serve" and can start receiving services. Once a worker has all of their require documents submitted and approved, they will be "Good to Go" and can start providing services.

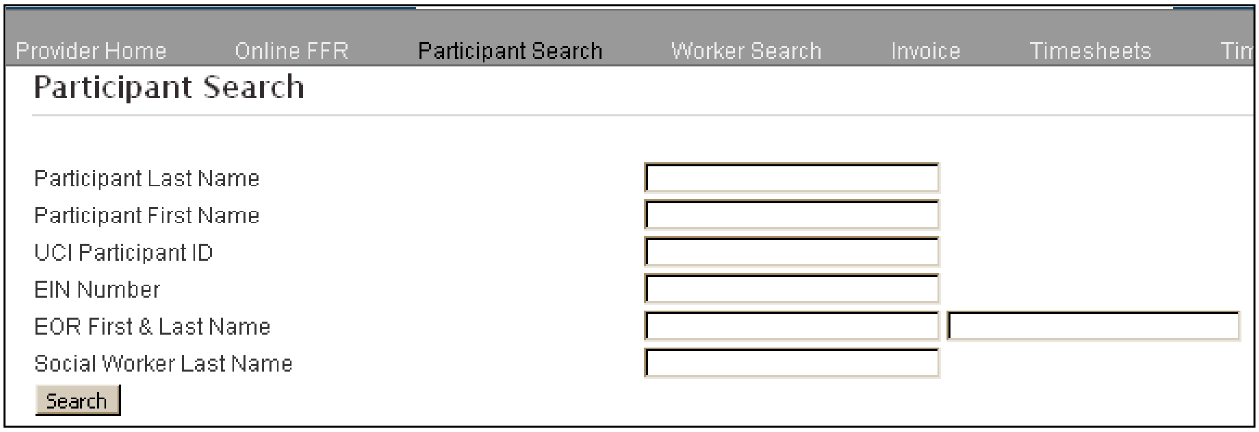
1. **Participant's Good-to-Serve** documents ( Employer of Record tax packet)
   - **IRS Form SS-4:** Application for Employer Identification Number.
   - **IRS Form 2678:** Employer Appointment of Agent.
   - **IRS Form 8821:** Tax Information Authorization.
   - **CA DE 1HW:** Registration Form for Employers of Household Workers.
   - **CA DE 48:** Power of Attorney Declaration. Informational sheet included in this packet.

2. **Worker's Good-to-Go Documents** (Worker Require Forms packet)
   - **Employee Application**
   - **Employee Agreement**
   - **USCIS Form I-9**
   - **IRS Form W-4**
   - **CA Form DE-4**
   - **Family Relationship Form**
   - **Training Form**
   - **Criminal Background Check Preference Form**

To check the good to go status for both the Participant and Associated Worker(s):

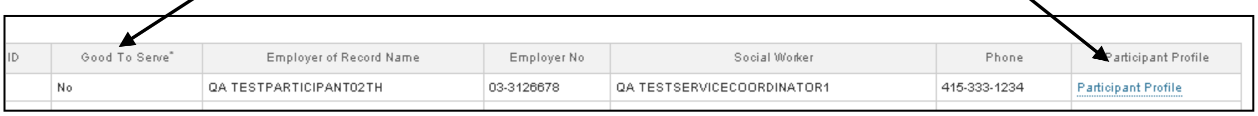
- Note: These steps have also been outlined in previous sections

1. Select "Participant Search" from the main menu



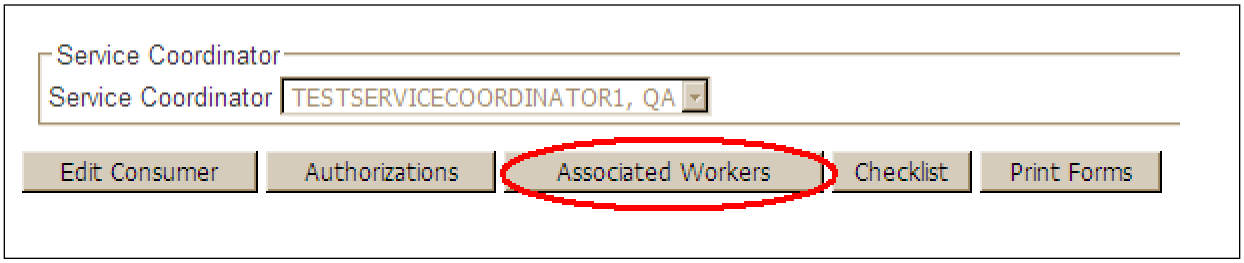

2. Search for the Participant whose "Good to Serve" Status you wish to see. You can search using any of the search fields available.

3. Once you locate the participant you are searching for, check their status in the "Good to Serve" column. If this is a 'No', PPL has not received all the required Participant paperwork. For details of what is still outstanding, hover over the 'No' in that column or select the 'Participant Profile' link and then the 'Checklist' link as described above.



| ID | Good To Serve* | Employer of Record Name | Employer No | Social Worker | Phone | Participant Profile |
|---|---|---|---|---|---|---|
| | No | QA TESTPARTICIPANT02TH | 03-3126678 | QA TESTSERVICECOORDINATOR1 | 415-333-1234 | Participant Profile |

4. To check on the Worker's "Good to Go" status, scroll to the bottom of the Participant Profile and click on "Associated Workers" button




5. You will be brought to the "Associate Workers to Participants" page, there is a column called "Good to Go" that shows the "Good to Go" status for each worker.
   - **Yes** means all paperwork is complete for the participant and worker
   - **No** means PPL still needs some paperwork.

6. To check what paperwork is missing for a "Good to Go" status of no, scroll the mouse the No. A box will appear that list all the documents that PPL still needs before any work can being.