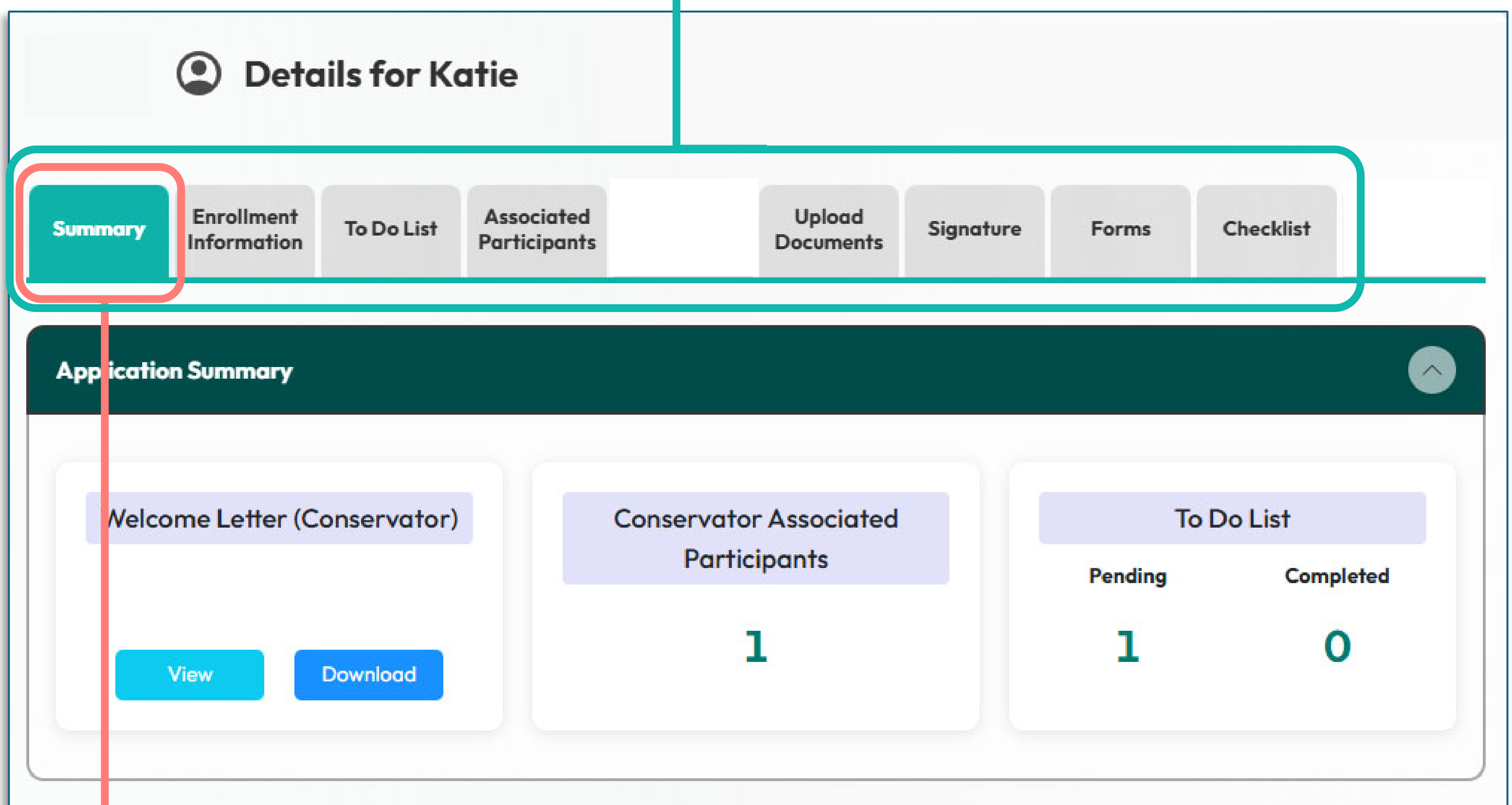
PPL@Home Navigation for Conservator

Walk-Me Guide | California SDP

PPL@Home is your home base for your California SDP experience. It can show you everything you need to help your participant manage his or her budget and Providers.

Navigating your PPL@Home is simple; it is organized by easy to view tabs, each with a unique functionality of your role as a Conservator.

Your PPL@Home profile is organized into tabs. Each tab has unique information to help you find your essential tasks as a Conservator.



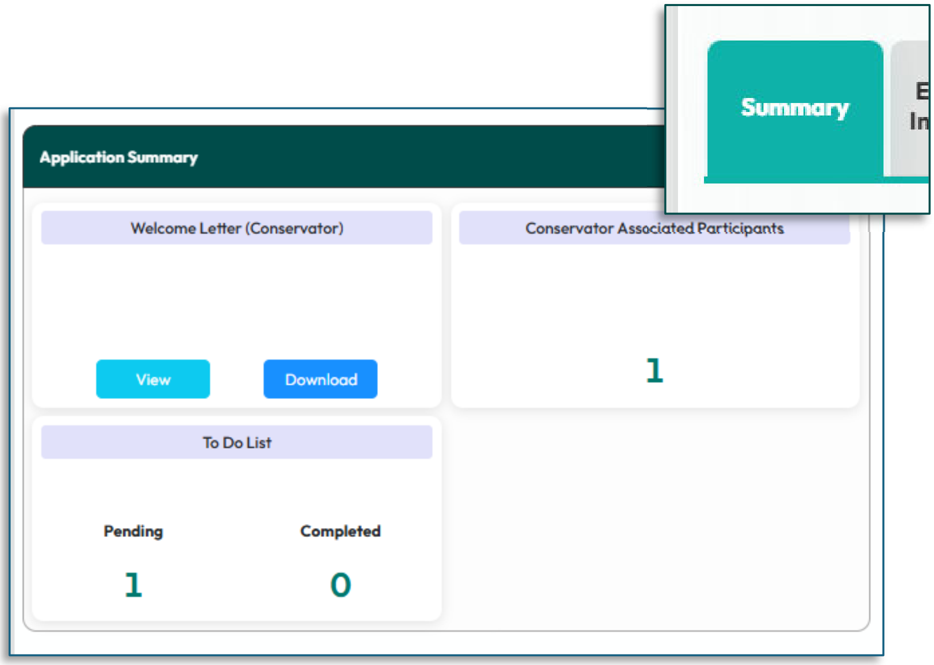
After logging in, you will see your Summary tab. This is as your home page for PPL@Home.

Summary

Shows you general information about your account.

What can I find and do here?

- Welcome Letter
- Shows the number of participants you are working with as a Conservator
- To Do list tracker

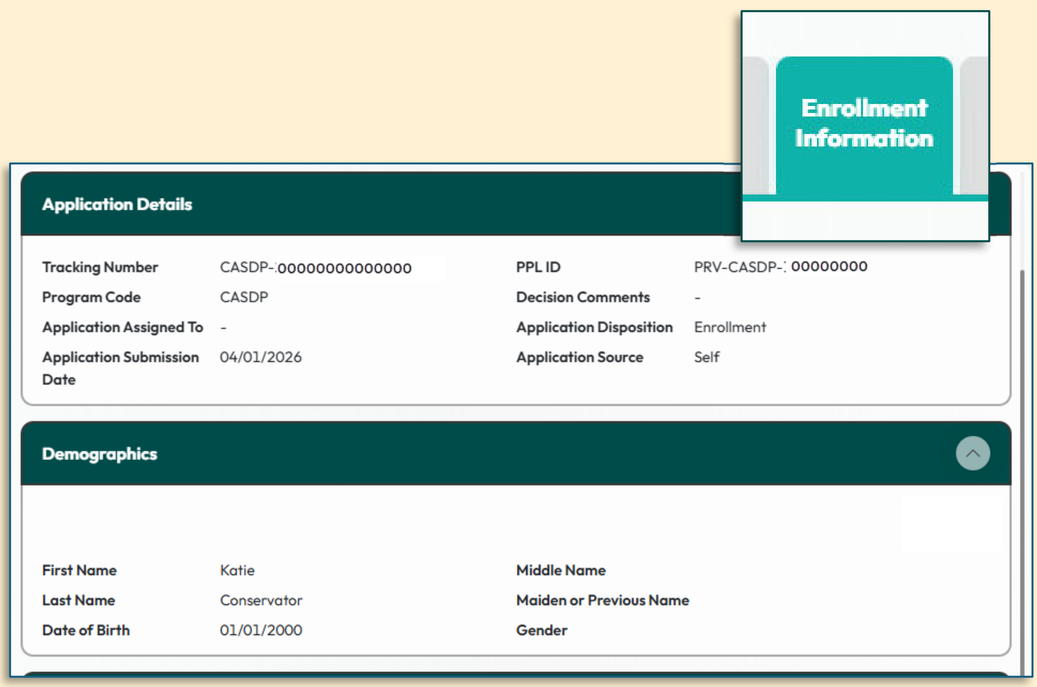


Enrollment Information

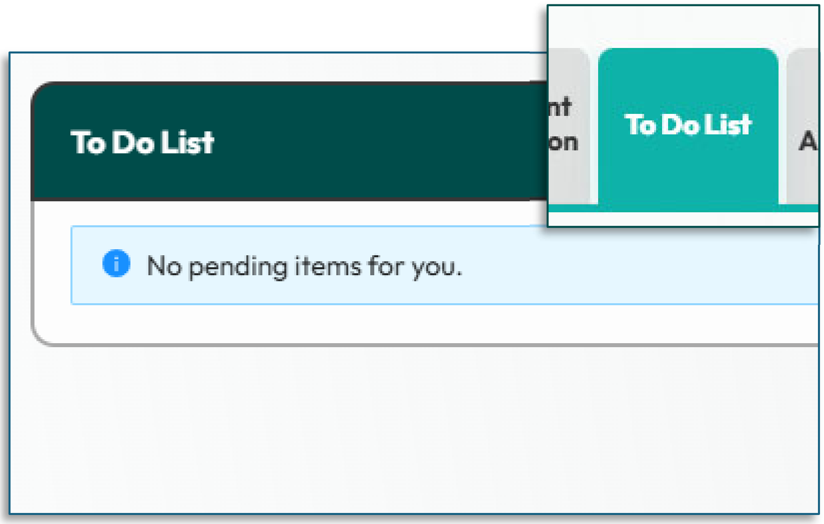
Shows demographic and unique information about you.

What can I find and do here?

- PPL ID
- Information about you
- Contact/ communication Details
- Identifiers



To Do List



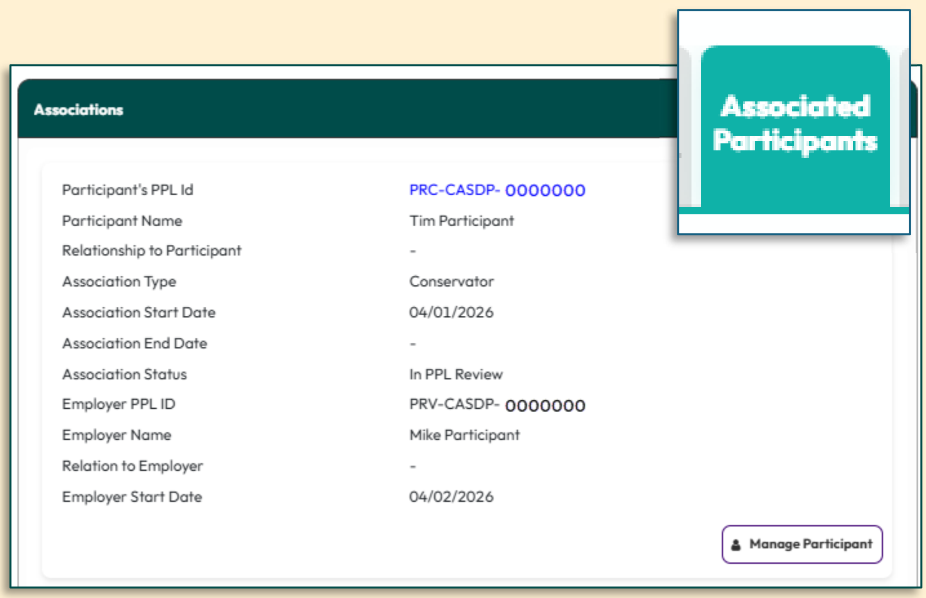
Shows the status of any required forms, documents, or actions that you must complete.

What can I find and do here?

- Required forms you need to finish
- Tasks on your account that need action to complete registration forms

If there are “No pending items for you” this means you have completed all your forms, and any forms you and your Participant complete together (joint employment forms) are completed.

Associated Participants



Lists all participants that you are working with as a Conservator. Each participant is listed on a separate line.

What can I find and do here?

- View details of each participant
- Manage your participant

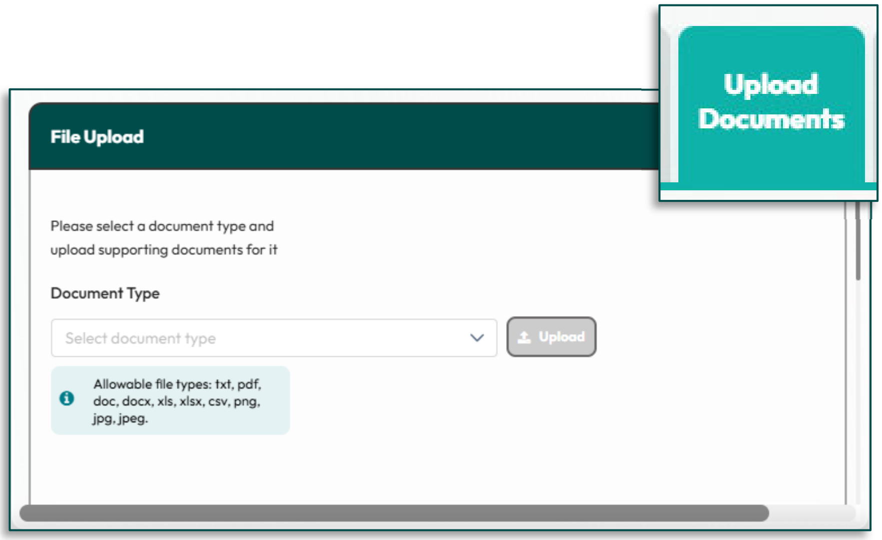
To complete tasks on behalf of your participant (approve timesheets, view budgets) click on the ‘Manage Participant’ button on the Participant line. You will see the participant’s PPL@Home profile and complete tasks.

Upload Documents

Upload any required documents. Choose the document type from the drop down, then click Upload. Then you can choose the document you would like to add.

What can I find and do here?

- Upload required documents and forms

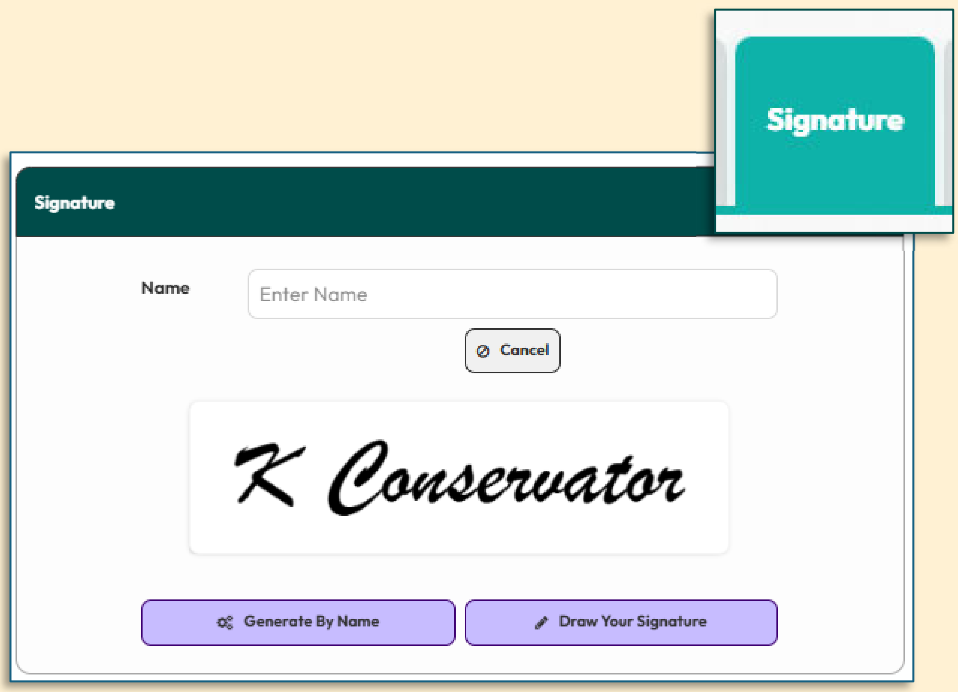


Signature

View or edit your electronic signature. You can edit your signature by clicking the Edit button.

What can I find and do here?

- Create an electronic signature for required forms

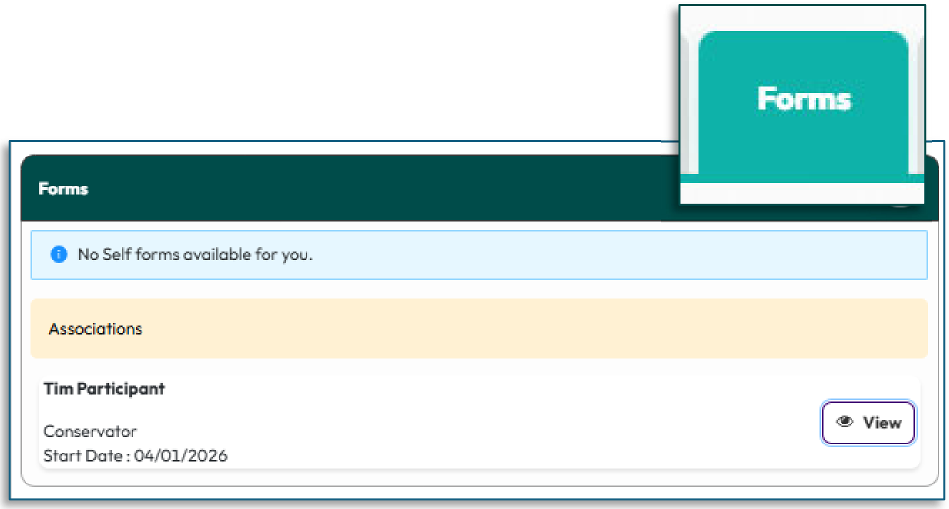


Forms

Holds all forms required to complete enrollment.

What can I find and do here?

- Status of uploaded "Proof of Conservatorship" documentation
- There are no forms to complete in PPL@Home for Conservators

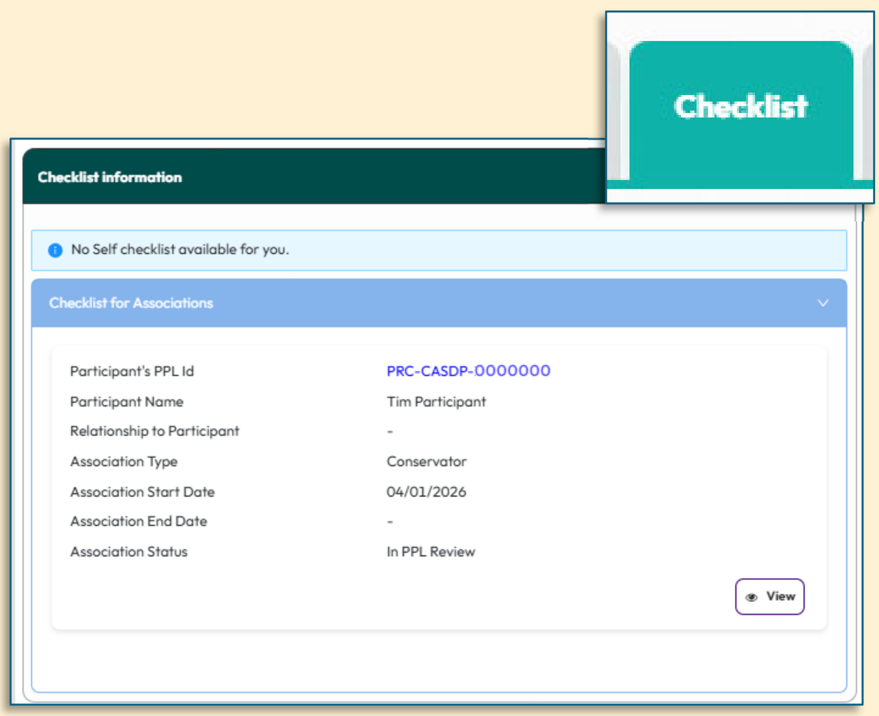


Checklist

Shows each form and information that must be on file for you to complete registration.

What can I find and do here?

- There are no forms for Conservators to complete. The **'Checklist'** tab will be updated by PPL staff when any Conservatorship documentation has been received and verified.



ACTING ON BEHALF OF YOUR PARTICIPANT

To perform tasks for your participant, like approving timesheets and invoices, Conservators must complete a few steps to begin.

1

From your PPL@Home profile, click the **'Associated Participants'** tab.

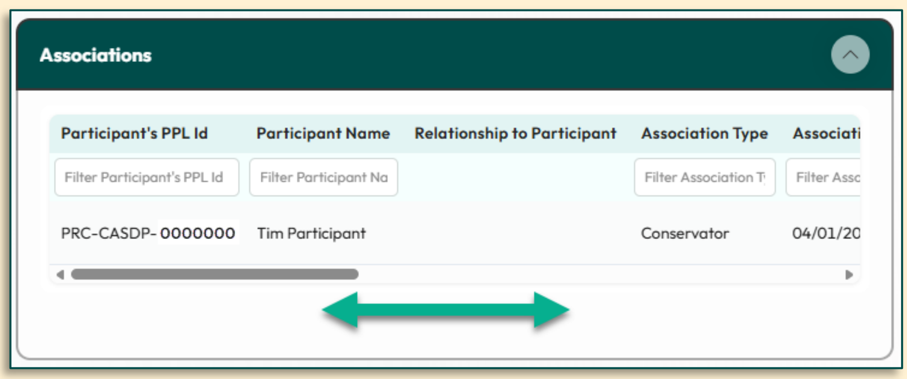
2

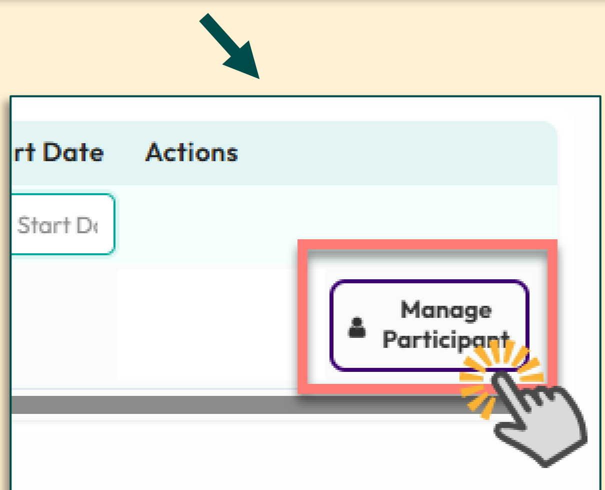
Locate the participant you would like to perform tasks for from the list.

Use the dark grey scroll bar to scroll to the right of the participant's line of information.

Click the **'Manage Participant'** button.

This will give you a PPL@Home view that mirrors the participant's view. Now, you can perform tasks the same way a participant would.





Call or email your Support Broker or Enrollment Specialist if you have any questions.