



Switching Roles in PPL@Home

Walk-Me Guide | California SDP



To perform actions in a different role within PPL@Home you will need to utilize role switching. For this demonstration we will demonstrate switching between Participant and Employer but the process will be identical for all individuals switching between roles.

1

When setting up your PPL@Home account if you are the **Employer of Record** (EoR) and have set Goods and Services to Only as “No,” setting up an employer will be mandatory during registration.

Add Associations

Expand All ↗ Collapse All ↗

Authorized Representative >

Employer ▾

One active Employer association is required when Goods and Services Only is set to No.

Search + Add Employer

2

With yourself as employer, information already entered will be populated.

Within the first drop down of “Who is responsible for employment tasks?” make sure to click **Self (Participant)**.

Click **Save** to continue.

Employer

Who is responsible for employment tasks? *
Self (Participant) × ▾

First Name * Middle Name Last Name * Date of Birth *
Middle Name

Gender * Social Security Number * ITIN EIN
Male ▾ ITIN EIN

Notes:
1. If EIN is lost/misplaced, then obtain your existing EIN using "How to ask the IRS for a 147c letter".
2. If EIN doesn't exist, PPL will obtain an EIN on your behalf after completion and submission of registration paperwork.

Please supply your telephone number and at least one other contact method: *
10-digit Mobile Number 10-digit Telephone Number

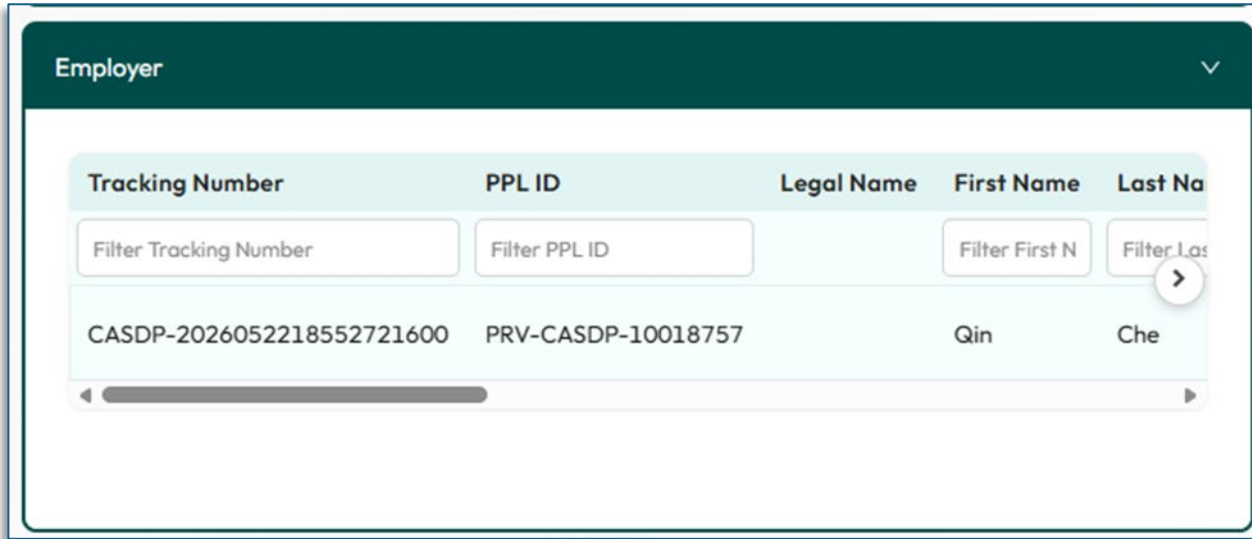
Search Your Address
Start with the street number (e.g., 123 Main...)

Address Line 1 *
Address Line 2 City *
Inglewood

Cancel Save

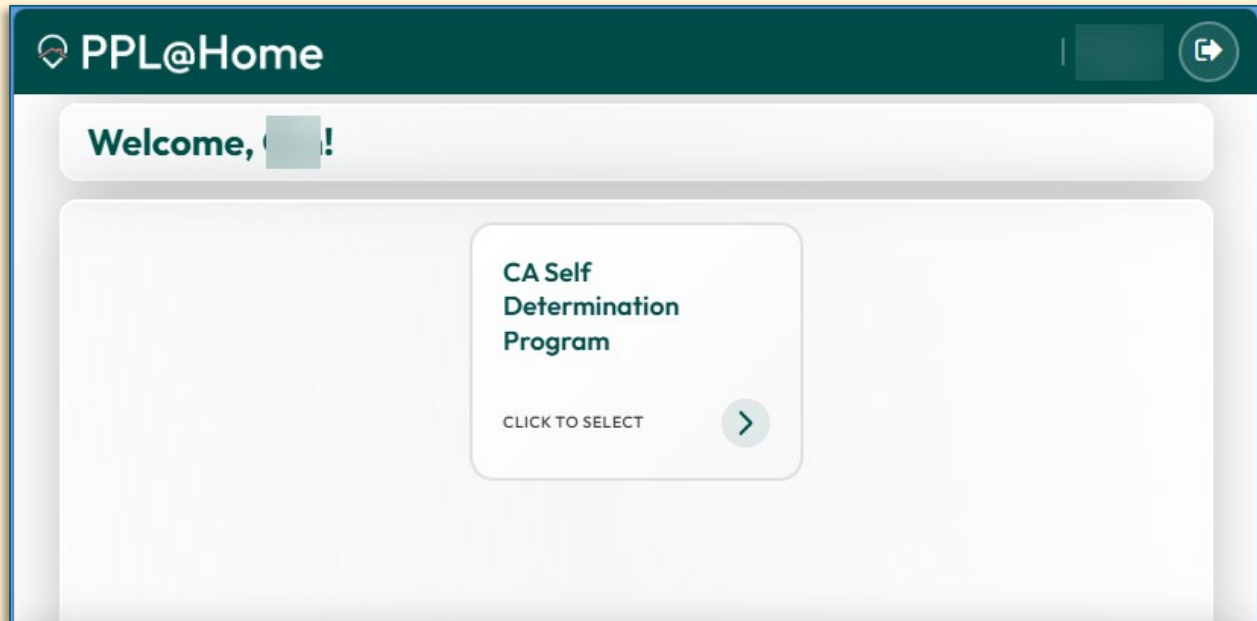
3

Once you have entered that information you will be able to see your name as the employer with a new PPL ID.



4

After you complete the enrollment process, click the tile for CA Self Determination Program when you are on the PPL@Home screen logged in as the participant.



5

A drop down will appear to select the profile.

The screenshot shows a web interface for the 'CA Self Determination Program'. At the top, there is a header 'CA Self Determination Program' and a button labeled 'CLICK TO SELECT' with a right-pointing arrow. Below this, a modal window titled 'Select Your Profile' is displayed. The modal contains the text 'Choose your profile for CA Self Determination Program' and two options: 'Employer' and 'Participant', each with a person icon and a right-pointing arrow.

6

If this is your first time logging to a new profile, you will be automatically directed to the enrollment screen.

Please note that some information will already be populated from what you entered when setting up as employer.

The screenshot shows the 'Create New Employer' enrollment screen. At the top, there is a header 'Create New Employer' and two tracking numbers: 'Tracking Number: CASDP-' and 'PPL ID: PRV-'. Below the header, there is a sidebar with a list of steps: 1. Basic Information, 2. Contact Details, 3. Communication Preferences, 4. Participant Associations, 5. Signature, 6. Forms, 7. Upload Documents, and 8. Summary. The main content area is titled 'Basic Information' and contains several input fields: 'Employer First Name *', 'Employer Middle Name', 'Employer Last Name *', 'Date of Birth *', 'Social Security Number *', 'ITIN', and 'EIN'. A 'Save and Next >' button is located at the bottom of the sidebar. A note at the bottom of the sidebar states: 'Once you have completed a section you can go back to view or edit from here. Fields marked with an * are required to move on to the next section.'

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



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