

This reference document outlines key aspects of submitting a new participant referral through the PPL Web Portal. The Participant and Common Law Employer information listed below must be available when entering a new participant into Portal. Failure to populate the necessary Participant and Common Law Employer information may delay the enrollment process.

**Section 1: Participant Demographic Profile**

A. In the Participant Demographic Information Section please complete (at a minimum) the key areas below. If you are able to complete the additional demographic fields please do so.

- ✓ MA ID (Medicaid ID)
- ✓ First Name
- ✓ Last Name
- ✓ Both Physical & Mailing Addresses
- ✓ County
- ✓ Social Security Number
- ✓ Date of Birth
- ✓ Phone Number
- ✓ Enrollment Status:
- ✓ Diagnosis Code
  - The diagnosis code in Portal is configured to accept numbers only – this means that decimals must always be dropped. In addition, there are other instances of having to “massage” how these codes are documented to get portal to accept them (see below):
    - *Diagnosis codes regularly have a decimal place holder in them (example: 234.1, the problem with that is, the Portal field for diagnosis codes does not accept decimals for these codes. The solutions to this are just drop the decimal and list the numbers in a row - 2341.*
    - *Diagnosis codes vary in length - 3 to 6 numbers. There are instances where the diagnosis code is still incomplete after removing the decimal point and can be resolved by adding a zero(s) to the end of the last number.*
- ✓ Waiver Type

**Important Note!**

- If a data point has a \* (red asterisk) next to it, it means it is required in order to save the profile. In other words, if you do not complete this data field and you submit the profile, you will lose all of your entries and the profile will not save.
- If a data question has OPTIONAL next to it, it means that this field is not necessarily needed in order to pay a timesheet for this participant’s DCW. However, many of these fields are important way that we contact the participant, so if you have the information please enter it.
- If a data question has *nothing* next to it, it means that is required in order to make the participant good to serve. If this data is missing the Participant will not be made good to serve.

- B. Once you have completed the required demographic information, please scroll down to the Common Law Employer section of the participant profile.

### **Section 2: Common Law Employer**

- A. The Common Law Employer section is **EXTREMELY** important!
- ✓ This section must be completed even if the Participant is serving as their own Employer.
  - ✓ This section is used by PPL to pre-populate the Common Law Employer packet. This means that if information is missing, it will not pre-populate on the packet and it will cause a delay in the enrollment process.
- B. In the Common Law Employer section at a minimum the following data questions must be completed:
- ✓ CLE First Name
  - ✓ CLE Last Name
  - ✓ Address
  - ✓ City
  - ✓ State
  - ✓ Zip Code
  - ✓ SSN (Social Security Number)
- C. If the Participant is going to serve as the Employer; you may use the copy button to pull the physical address from the participant profile into the Common Law Employer profile.

### **Section 3: Designated Representative**

- A. The Designated Representative section is for those individuals who are not serving as the legal employer but who plan to assist the participant in the management of their authorizations and direct care workers.
- ✓ As part of the Common Law Employer packet, the participant/employer is asked to identify if a designated representative exists. If the participant does not plan to use a designated representative this section may remain blank.
  - ✓ If a participant does plan to use a designated representative this section must be completed.

### **Section 4: Emergency Contact**

- A. The Emergency Contact data fields are all optional fields. If the participant does not wish to provide us with an emergency contact they are not required to do so.
- ✓ Please be aware however, that PPL customer service will only provide information related to the Participant's account to the Participant, Employer, Designated Representative, Emergency Contact and assigned Service Coordinator.
  - ✓ If no Designated Representative or Emergency Contact are noted in the Web Portal the PPL customer service representative will not release the participant's information to the caller.