NY CDPAP Consumer Transition to PPL via PPL@Home

This is an overview of how to transition to PPL through PPL@Home. It can be used as a reference to offer information and guidance to existing consumers. Transitioning via phone is also an option for consumers who do not have a smartphone or computer.

Getting started in PPL@Home

You will be sent a link, either by email or text message, to begin the transition process. If you have not received a link, contact PPL or the CDPAP facilitator.

Information you will need to transition:

1. Medicaid Client ID (CIN)
2. Required Documents
3. Contact information regarding any Personal Assistants or Authorized Representatives

The transition process includes eight steps:

Step 1: Registration Information (General information about you).

Required Information:

1. First Name
2. Last Name
3. Date of Birth
4. CIN (or SSN* if a CIN can't be provided)

**SSN highly encouraged for consumer searching purposes in our systems but not required.*

Step 2: Contact Details (Your current contact information).

Required Information:

1. Email address and/or,
2. Mobile phone number
3. Address

Step 3: Communication Preferences (How and when you would like to be communicated with).

Required Information:

1. What is the preferred method of completing your registration?

cont.

Step 4: Associations

Click one of the dark green title bars, and select the button to Add a new Association under the type you have selected. When saved, associated individuals will receive a link to transition to PPL.

Step 5: Signatures

Adding a signature will allow you to electronically sign any forms or documents. You can do this in two ways:

1. Typing your name and selecting 'Generate By Name'
2. Draw Your Signature

Step 6: Forms **(Documents that you can sign electronically).**

If any documents are **incomplete, they will say '0/1'**; when **completed, '1/1'.** The forms will autofill with any information entered prior. To sign, you can click a check box if available, or click to add your signature created in Step 5: Signature.

With verbal consent, a customer service agent can sign off on **the Memorandum of Understanding (MOU) form ONLY** on your (the consumer's) behalf if you choose. You must still generate a signature in Step 5: Signatures. **Any other forms must be completed and signed by you and cannot be signed on your behalf.**

Step 7: Required Documents **(Used for uploading any necessary documents).**

Select the type of document, then upload. Only certain file types will be accepted.

Step 8: Summary

Summary shows all information that has been added, as well as any that is missing. Once submitted, a confirmation window will appear with your Tracking Number and PPL ID. Save these numbers as you will need them when contacting PPL or a CDPAP facilitator.

What happens next?

You will have access to your dashboard where you can view the status of your information and transition to PPL. If additional information/documents are needed, you will be contacted through your preferred communication method from Step 3.

For help with this process, you can contact PPL directly at +1 833 247 5346