

Quick Reference Guide: Agent Assignment and Actions

Steps:

1

The screenshot shows the Ohio Provider Network Management dashboard. The top navigation bar includes links for Provider Network Management, Medicaid Home, Learning, Contact, Fee Schedule, and a Log out button. Below the navigation bar, there are tabs for My Providers, Select Provider, Pending Agent Requests, and Account Administration. The Account Administration tab is highlighted with an orange arrow. Below the tabs, there is a table with columns for Reg ID, Provider, Status, Provider Type, NPI, Medicaid ID, Specialty, DD Contract Number, DD Facility Number, Location, Effective Date, Submit Date, and Revalidation Due Date. The table contains one row of data for a provider with Reg ID 517966, Name Test Training, Status Complete, Provider Type 69 - Pharmacist, NPI 1952999328, Medicaid ID 9999885, and Specialty PHARMACIST.

Reg ID	Provider	Status	Provider Type	NPI	Medicaid ID	Specialty	DD Contract Number	DD Facility Number	Location	Effective Date	Submit Date	Revalidation Due Date
517966	Test Training	Complete	69 - Pharmacist	1952999328	9999885	PHARMACIST				03/11/22	03/18/22	03/11/25

A user with an Administrator role can assign users with an Agent role abilities to complete actions for specific providers (Medicaid IDs)

If you have an Administrator role, to begin this process, click the **Account Administration** button on your homepage/dashboard

2

From the drop-down menu, select the **Medicaid ID** of the provider for which you want the Agent to complete actions

Once a Medicaid ID is selected, the 'Name' line will populate, allowing you to confirm you have selected the correct provider

The screenshot shows the Provider Account Administration form. It has a title 'Provider Account Administration'. Below the title, there are three input fields: 'Medicaid ID:' with a dropdown menu, 'Name:' with a text field, and 'Change admin to:' with a text field. The 'Medicaid ID' dropdown is selected, and the 'Name' field is populated with 'Test Training'. Below the input fields, there is a 'Change Admin' button. At the bottom of the form, there are three buttons: 'Add User', 'Save', and 'Cancel'.

3

To add a new user with an Agent role, click the **Add User** button at the bottom of the page

Note: The message in red text at the top of the page "No Agents are mapped to this Medicaid ID" will only appear when there are no agents assigned to a provider (Medicaid ID)

The screenshot shows the Provider Account Administration form. It has a title 'Provider Account Administration'. Below the title, there is a red message: 'No Agents are mapped to this Medicaid ID.' Below the message, there are three input fields: 'Medicaid ID:' with a dropdown menu, 'Name:' with a text field, and 'Change admin to:' with a text field. The 'Medicaid ID' dropdown is selected, and the 'Name' field is populated with 'Test Training'. Below the input fields, there is a 'Change Admin' button. Below the 'Change Admin' button, there are two messages in a box: 'No users to activate/de-activate.' and 'No matching records found.' At the bottom of the form, there are three buttons: 'Add User', 'Save', and 'Cancel'.

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Steps:

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User Information

User ID*	<input type="text" value="agent1"/>
Email Address*	<input type="text" value="test@test.com"/>
Confirm Email*	<input type="text" value="test@test.com"/>

Enter the user ID (OH|ID) and email address (address linked with OH|ID account) for the Agent you wish to assign actions to

Click **Save** once details are entered

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Check the check box for each action that you want the user with the Agent role to have *(multiple boxes can be selected)*

**A full list of available actions is listed on [Page 3](#) of this document*

When all actions have been assigned, click **Save**

Action	agent1
Deactivate User	<input type="button" value="De-activate"/>

Agent Role	agent1
Hospital Contact	<input type="checkbox"/>
Hosp Cost Report Upload	<input type="checkbox"/>
Hospice Enroll Search	<input type="checkbox"/>
Hospice Enroll Maintenance	<input type="checkbox"/>
Prior Authorization Submit	<input type="checkbox"/>
Prior Authorization Search	<input type="checkbox"/>
Eligibility	<input type="checkbox"/>
Claim Search	<input type="checkbox"/>
Claim Submission	<input type="checkbox"/>
1099 Information	<input type="checkbox"/>
View Remittance Advices	<input type="checkbox"/>
Deemed Eligibility	<input type="checkbox"/>
Sign Approve LTC Cost Report	<input type="checkbox"/>

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Action	agent1
Deactivate User	<input type="button" value="De-activate"/>

Agent Role	agent1
Hospital Contact	<input type="checkbox"/>
Hosp Cost Report Upload	<input type="checkbox"/>
Hospice Enroll Search	<input type="checkbox"/>
Hospice Enroll Maintenance	<input type="checkbox"/>
Prior Authorization Submit	<input checked="" type="checkbox"/>
Prior Authorization Search	<input checked="" type="checkbox"/>
Eligibility	<input checked="" type="checkbox"/>
Claim Search	<input checked="" type="checkbox"/>
Claim Submission	<input checked="" type="checkbox"/>
1099 Information	<input type="checkbox"/>
View Remittance Advices	<input type="checkbox"/>
Deemed Eligibility	<input type="checkbox"/>
Sign Approve LTC Cost Report	<input type="checkbox"/>

The next time this provider (Medicaid ID) is accessed through the Account Administration screen, all Agents assigned to the provider will display

To add new actions, click the check box for each action and click **Save**

To remove actions, unclick the check box for each action and click **Save**

To de-activate the Agent from accessing the provider (Medicaid ID), click **De-activate**

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Agent Roles/Actions:

<u>Role Name</u>	<u>Description</u>
1099 Information	Agent role with the ability to update 1099 Information
Claim Search	Agent role with the ability to search for claims information
Claim Submission	Agent role with the ability to submit claims
CPC Agent	Allows agents access to update and submit CPC Applications
Deemed Eligibility	Agent role needed for access to Ohio Benefit's Eligibility Portal
DODD Secondary User	DODD User role that can make updates to DD registrations, based on the assignment of facility or contract number. Granted access by the CEO Certified provider role
Eligibility	Agent role with the ability to search for recipient eligibility
FQHC Cost Report Upload	Agent role with the ability to upload FQHC Cost Reports
Group Agent	Allows agents access to CPC Group Member, Group, Group Affiliation, Group Member, Group Members
Hospice Enroll Maintenance	Agent role with the ability to maintain Hospice enrollments
Hospice Enroll Search	Agent role with the ability to search Hospice enrollments
Hospital Contact	Agent role with the ability to update Hospital Addresses on behalf of the provider
Hospital Cost Report Upload	Agent role with the ability to upload Hospital Cost Reports
Lead Investigation Cost Report Upload	Agent role with the ability to upload LI Cost Reports
MDS Report	Agent role with the ability to download MDS Reports. This individual must be an employee of the provider
OHF Cost Report Upload	Agent role with the ability to upload OHF Cost Reports
Prenatal Visit	Agent role needed to authenticate with Duet's Nurture Ohio System
Prepare Save LTC Cost Report	Agent role with the ability to prepare LTC Cost Reports and Trade Files
Prepare Save MSP Cost Reports	Agent role with the ability to approve MSP Cost Reports
Prior Authorization Search	Agent role with the ability to search prior authorizations
Prior Authorization Submit	Agent role with the ability to submit prior authorizations
Provider Payment Innovation Reports Agent	Agent role with the ability to view the HAVEN reports
RHC Cost Report Upload	Agent role with the ability to upload RHC Cost Reports
Sign Approve LTC Cost Report	Agent role with the ability to approve LTC Cost Reports and Trade Files
Sign Certify MSP Cost Reports	Agent role with the ability to approve MSP Cost Reports
View FQHC Cost Report	Agent role with the ability to view FQHC Cost Reports
View Hospital Cost Report	Agent role with the ability to view Hospital Cost Reports
View LI Cost Report	Agent role with the ability to view LI Cost Reports
View LTC Cost Report	Agent role with the ability to view LTC Cost Reports and Trade Files
View MSP Cost Report Due Date	Agent role with the ability to view MSP Cost Report Due Date
View MSP Cost Reports	Agent role with the ability to view MSP Cost Reports
View OHF Cost Report	Agent role with the ability to view OHF Cost Reports
View Provider Reports	Agent role with the ability to view Provider Reports in PNM
View Remittance Advices	Agent role with the ability to view remittance advice
View RHC Cost Report	Agent role with the ability to view RHC Cost Reports
View SURS	Agent role needed to view SURS File Type Overpayment Letter and SURS Reconsideration Response