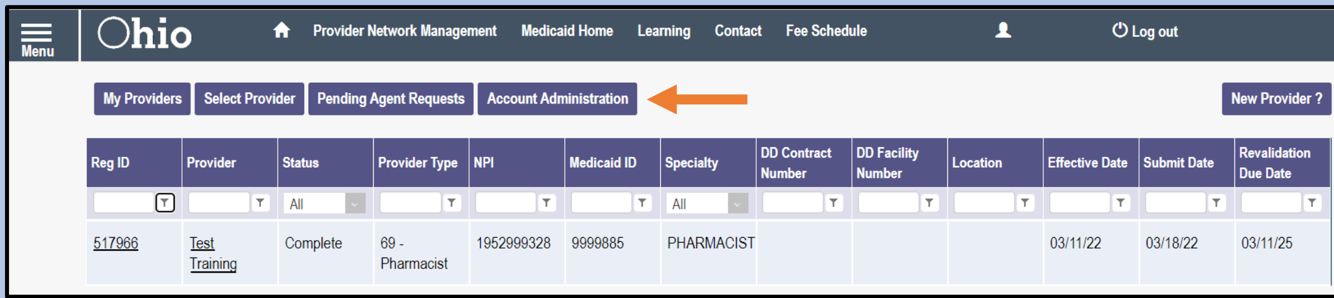
Quick Reference Guide: Agent Assignment and Actions

Steps:

1



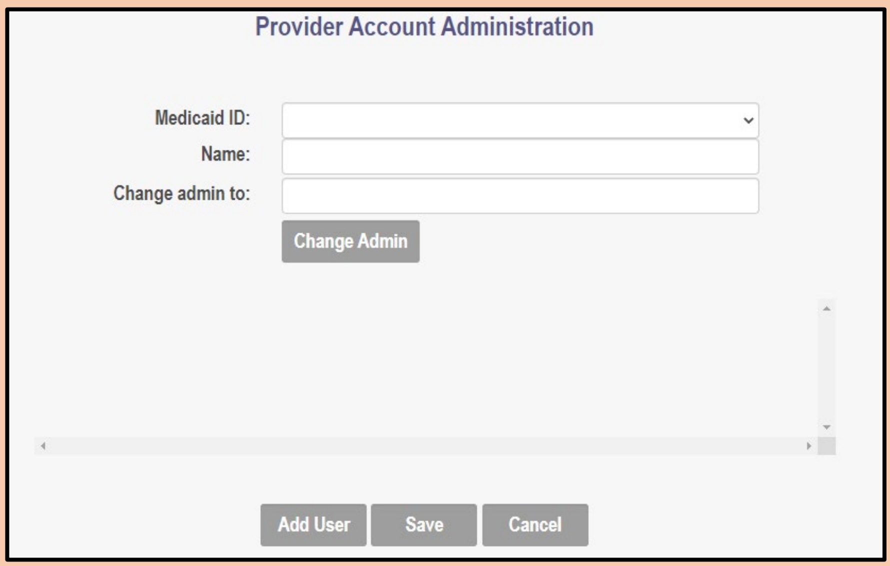
A user with an Administrator role can assign users with an Agent role abilities to complete actions for specific providers (Medicaid IDs)

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

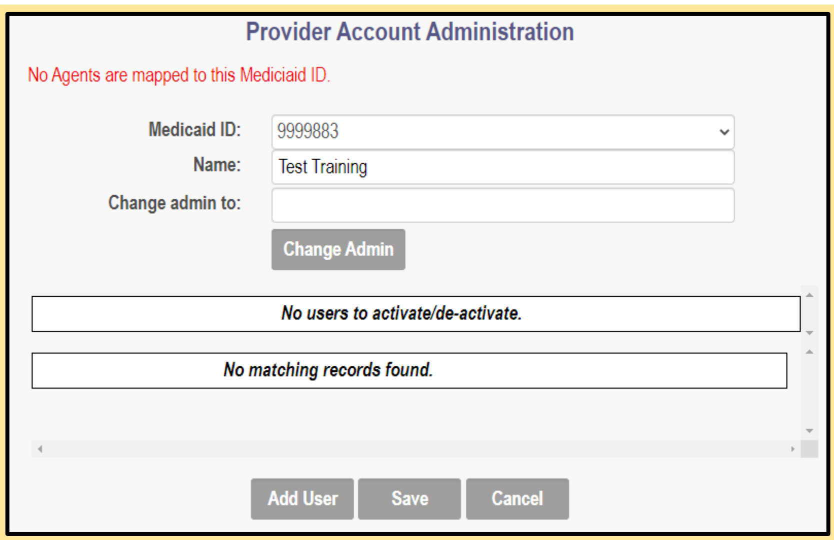
Once a Medicaid ID is selected, the 'Name' line will populate, allowing you to confirm you have selected the correct provider



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)



Disclaimer: It is the Provider's responsibility to keep information up to date in PNM. This includes specialties, contact information, addresses, etc.

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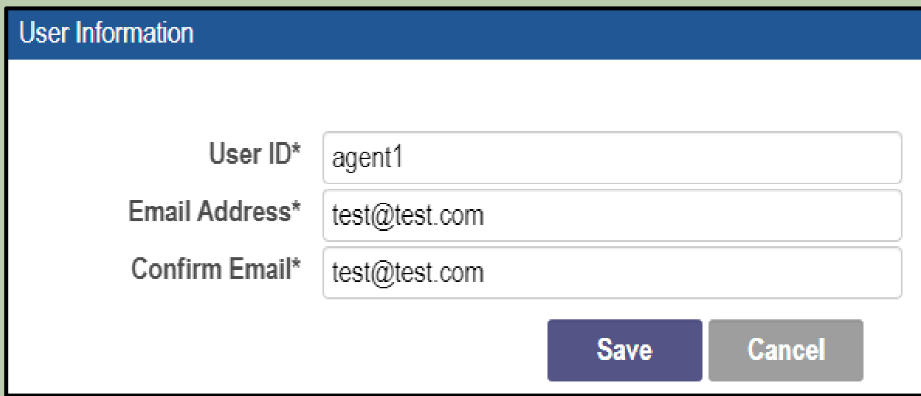
Steps:

4



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

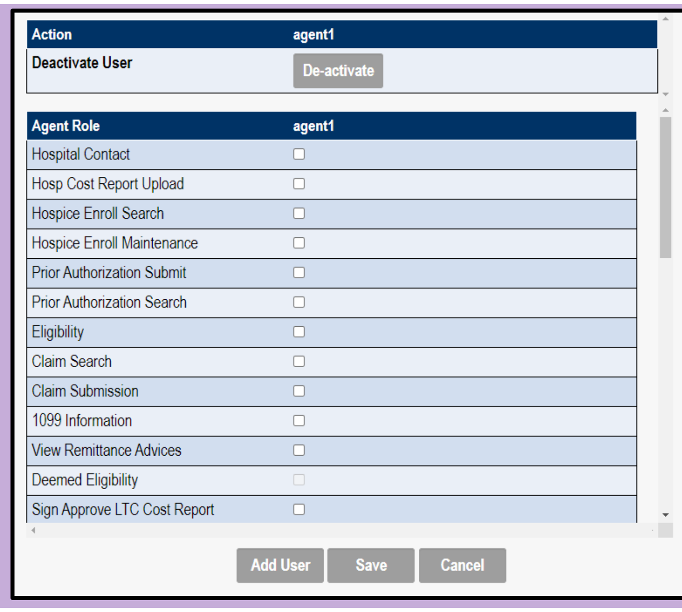
Click **Save** once details are entered

5

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**



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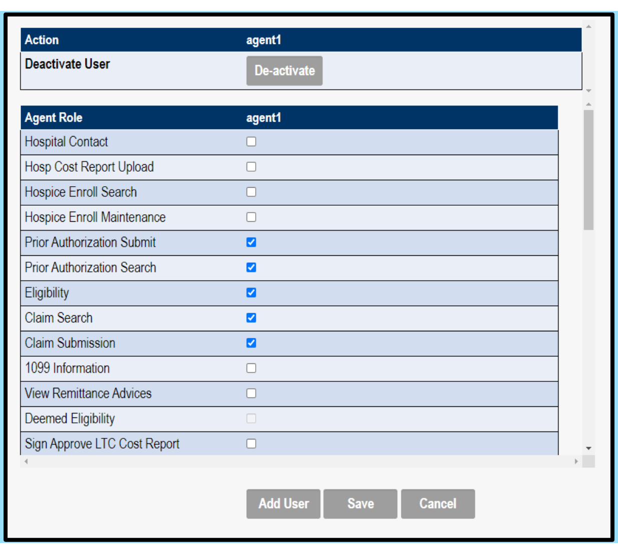

The next time this provider (Medicaid ID) is accessed through the Account Administration screen, all Agents assigned to the provider will display

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:

Role Name	Description
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