Bulk Agent Upload Quick Reference Guide:

Steps:

1

If you are a Provider Administrator or Power Agent with Access Management granted, you will now have access to a Bulk Agent Upload process that is recommended for use with <u>high volumes of agent provisioning.</u>

If you are only provisioning a small amount of Provider Agents, please continue to use the Account Administration button.

- To begin the Bulk Agent upload process , click the **Agent Bulk Upload** button. The **Bulk Agent Upload** screen appears.
Note: You will see Bulk Agent Upload History and the Bulk Agent Error Code Reference in this screen.
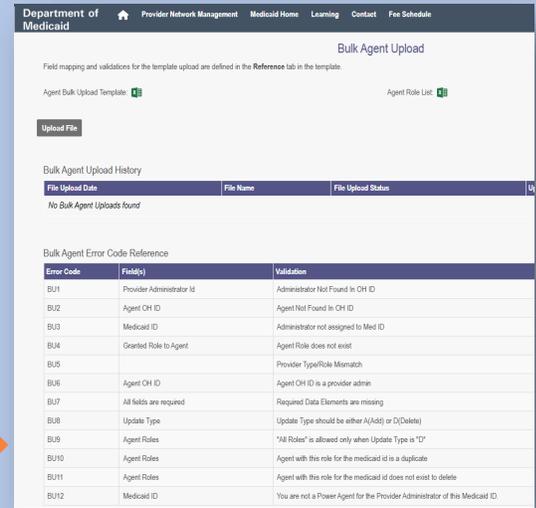
2

- Click on the Excel icon next to the **Agent Bulk Upload Template** to download and open the template.

- Click on the Excel icon next to the **Agent Role List** to view a current list of Agent roles that are used in the template.

- For your convenience, a **Reference** tab has been included on the Agent Bulk Upload Template for assistance and more information.

3

Enter the required Provider Agent information into the **Agent Bulk Upload Template** (*See **Reference** tab on template for help, also featured on **page 3** of this QRG*).

You will need to include:

- **Update Type** (*"A" to Add a specific role or "D" to Delete a specific role*)

- **Provider Admin OHID**

- **Medicaid ID** *(Must be 7 digits, please include any leading zero(s)*

- **Agent OHID**

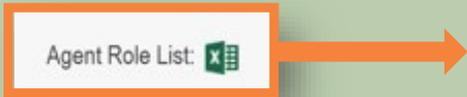- **Granted Role to Agent** *(from Agent Role list)*

Note:
- *It is recommended to copy/paste values into the Agent Bulk Upload Template whenever possible.*

- *For the 'All Roles' provisioning, you may ONLY use the Update Type of D for 'Delete'.*

- *You can only assign one role per line in the Bulk Agent Upload Template, so if a Medicaid ID needs several roles assigned, the Medicaid ID can be used multiple times in the same Bulk Agent Upload Template.*

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

Steps:

4

Agent Role List: 📊 →

- To view the Agent Roles currently available, click on the Excel icon next to **Agent Role List**. The list will download and allow you to choose which roles to assign to a specific Medicaid ID.

- *Note: You can only assign one role per line in the Bulk Agent Upload Template, so if a Medicaid ID needs several roles assigned, the Medicaid ID can be used multiple times in the same Bulk Agent Upload Template.*

	Role Name
1	**Role Name**
2	Hospital Contact
3	Hosp Cost Report Upload
4	Hospice Enroll Search
5	Hospice Enroll Maintenance
6	Prior Authorization Submit
7	Prior Authorization Search
8	Eligibility
9	Claim Search
10	Claim Submission
11	1099 Information
12	View Remittance Advices
13	Deemed Eligibility
14	Sign Approve LTC Cost Report
15	Prepare Save LTC Cost Report
16	View LTC Cost Report
17	View Provider Reports
18	Prepare Save MSP Cost Reports
19	Sign Certify MSP Cost Reports
20	View MSP Cost Reports
21	View MSP Cost Report Due Date
22	Prenatal Visit
23	View SURS
24	Group Agent
25	Provider Alternative Payment Model Agent

	Role Name
26	Retrieve Reports
27	APM Agent
28	Correspondence
29	FQHC Cost Report Upload
30	View FQHC Cost Report
31	RHC Cost Report Upload
32	View RHC Cost Report
33	Lead Investigation Cost Report Upload
34	View LI Cost Report
35	View Hospital Cost Report
36	MDS Report
37	OHF Cost Report Upload
38	View OHF Cost Report
39	Enrollment Agent
40	Trade Files
41	Sign Certify Hospital Cost Report
42	Sign Certify FQHC Cost Report
43	Sign Certify RHC Cost Report
44	Sign Certify OHF Cost Report
45	Cost Report Management Agent
46	MCO Agent
47	EFT Agent

Role Names +

5

After the Agent Bulk Upload file is complete and ready to upload, click the **Upload file** button. You may add a Name and Description to this upload should you choose.

Agent Bulk Upload

Choose File | No file chosen
Name
Description

[Upload file] [Cancel]

Bulk Agent Upload History

File Upload Date	File Name	File Upload Status	Upload	Response
09/13/2025	Bulk_Upload_Agent_Template_Test1_2.xlsx	Complete	View Upload	View Response

- The newly added Bulk Agent Upload file will show the upload status and date in the **Bulk Agent Upload History** chart.

- Click **View Upload** to view the uploaded file.

- Click **View Response** to view the result of the submissions (Bulk Agent Upload Error Codes *OR* Accepted). This can take up to 15 minutes to be visible under the Response column.

6

The **Bulk Agent Error Code Reference** section will list any error codes, fields, and details on the error that result after uploading the Agent Bulk Upload file.

Note:
If an error code displays on more than one line, the Bulk Agent Upload Template needs to be corrected in each line with an error and uploaded again. Any line that does not include an error will be Accepted.

Afterward, click the View Response button to determine whether the correction is Accepted. If the upload is Accepted, those Agents have been provisioned.

Bulk Agent Error Code Reference

Error Code	Field(s)	Validation
BU1	Provider Administrator Id	Administrator Not Found In OH ID
BU2	Agent OH ID	Agent Not Found In OH ID
BU3	Medicaid ID	Administrator not assigned to Med ID
BU4	Granted Role to Agent	Agent Role does not exist
BU5		Provider Type/Role Mismatch
BU6	Agent OH ID	Agent OH ID is a provider admin
BU7	All fields are required	Required Data Elements are missing
BU8	Update Type	Update Type should be either A(Add) or D(Delete)
BU9	Agent Roles	"All Roles" is allowed only when Update Type is "D"
BU10	Agent Roles	Agent with this role for the medicaid id is a duplicate
BU11	Agent Roles	Agent with this role for the medicaid id does not exist to delete
BU12	Medicaid ID	You are not a Power Agent for the Provider Administrator of this Medicaid ID.

Reference Tab on Bulk Agent Upload Template:

The Reference tab in the Bulk Agent Upload Template helps you enter the correct value* in each row and column to minimize errors and ensure the upload is accepted. For current Agent Roles, refer to the Agent Role List in step 4 of this QRG.

Column Name	Comments
Update Type	"**A**" = Add a specific role "**D**" = Delete a specific role
Provider Administrator OH ID PROD	No special formatting required
Medicaid ID	Must be 7 digits Please include and leading zero(s)
Agent OH ID PROD	No special formatting required
GrantedRole to AGENT	Add one Role per line, unless "D" or "All Roles" If "D" is selected for Update Type, all roles can be decommissioned for an agent by putting "All Roles" in this field

It is recommended to copy/paste values into the Agent Bulk Upload Template whenever possible

Please Note:

- It is the <u>organization's responsibility</u> to establish and enforce internal policies for managing Provider Administrator role assignments, Power Agent designations, and related changes to ensure accuracy, accountability, and operational integrity.

- Best practices for organizational Provider Administrators include establishing clear internal policies for managing Power Agent assignments and role changes. <u>These responsibilities rest with the organization to ensure accountability and minimize errors.</u>

- <u>Organizations are expected to proactively define and maintain</u> internal processes for managing Provider Administrator roles and Power Agent assignments, ensuring changes are handled accurately and consistently to support effective oversight.