Power Agent Assignment Quick Reference Guide:

What is a Power Agent?

The **Power Agent role** in PNM will give designated Provider Agents broader access to perform nearly all administrative functions. This will offer enhanced flexibility for organizations that need more than one person to have administrator capabilities. This role was developed in response to provider feedback and is designed to enhance administrator capabilities—especially for organizations managing large numbers of agents.

- **If your organization has no agents, very few agents, or is satisfied with your current setup, no action is required.**
- No system changes will be made to your current configuration unless you choose to utilize the new role.

Please Note:

- It is the organization's responsibility 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. These responsibilities rest with the organization to ensure accountability and minimize errors.

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

Steps:

Provider Administrator Dashboard: Enabling Power Agents

A new screen to provision (or assign) Power Agents is now available from the Power Agent Access Mgmt button.

- After logging into your **Provider Administrator dashboard** with your OHID, click the **Power Agent Access Mgmt** button.

- In the **Power Agent Access Management** screen, by "I would like to enable Power Agents", you may choose 'No' or 'Yes'. The system default is 'No' (1 admin only).

- To add Power Agents, click the bubble **'Yes (will require at least 1 Power Agent)'**.

1.1

- After clicking '**Yes**', the **Power Agent Provisioning History** section will appear.
- Click **Add New**. Then, the **Add New Power Agent** box will pop up, and you will be able to select the appropriate Provider Admin from the dropdown that this new Power Agent will be assigned to after completing this step.

- When appropriate, click the box under '**Access Management**' to grant the Power Agent the ability to provision other Power Agents, assign Agent roles/actions, complete a Global Admin Change, and more.

- Enter the **Power Agent's OHID**. Then click the '**Add**' button.

  Note:
  Delegated Provider Administrators – May assign up to 10 Power Agents
  All other Provider Administrators – May assign up to 5 Power Agents

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Steps:

- Once you see the Power Agent has been added to the **Power Agent Provisioning History** section, the Provider Administrator will be able to **Edit**, **Save**, and **Deactivate** the Power Agent under the Actions column.

- The Provider Admin can also edit the **'Access Management'** role of a specific Power Agent on this screen.

- Once desired Edits have been made, click **'Save'**.

- Once you click '**Deactivate**', a dialog box will pop up to confirm your choice. Click **OK** to proceed with deactivation of this Power Agent. The Power Agent will be removed from Power Agent Provisioning History section.
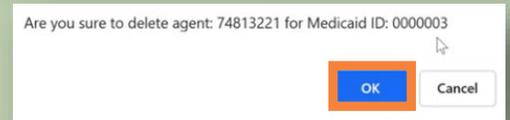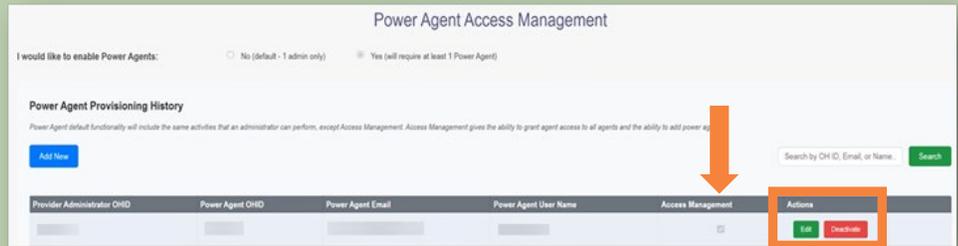

## 2 Power Agent Dashboard: Selecting your Provider Administrator

- Log in to your **Power Agent dashboard** with your OHID.

- If you have been provisioned by more than one Provider Administrator; you will be prompted to select your Provider Admin's OHID from the dropdown. Then click **OK**.

- Your Power Agent dashboard will display red text indicating the name and OHID of the Provider Admin you have chosen.

- If you would like to select a different Provider Admin you are assigned to, click on the **Switch Administrator** button to choose the preferred Provider Admin from the dropdown.

  Note: It is possible to be provisioned as a Power Agent with one Provider Admin, and as a Provider Agent by another Provider Admin. You may toggle between these dashboards by clicking Switch Administrator as shown on the right.
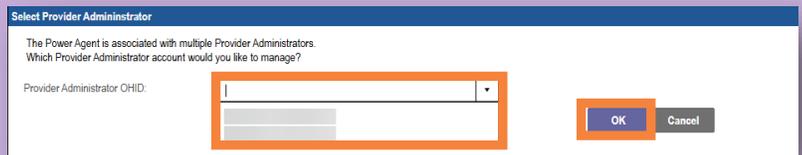
## 2.1 Power Agent Dashboard: Enabling your own Power Agents
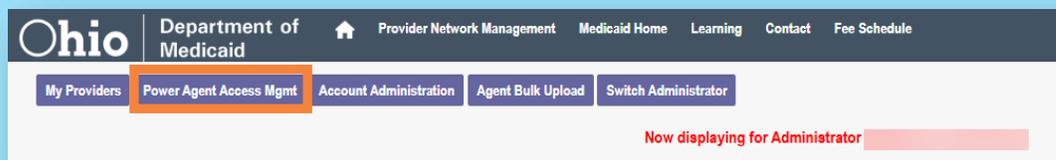
- If you are a Power Agent with Access Management, you may enable and provision Power Agents of your own.

- To do so, click on the **Power Agent Access Mgmt** button on your dashboard.

- Follow steps 1-1.2 of this QRG

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

Power Agent Assignment Quick Reference Guide:

## Steps:

Power Agent Access Management Functionality

- Power Agents can be provisioned **with** OR **without** Access Management.
- The comparison chart below details the abilities a Power Agent has whether or not their Provider Administrator chooses to grant them Access Management.
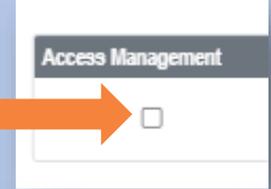
Access Management

PNM Dashboard Button	Power Agent Function	Without Access Management	With Access Management
Reg ID / Provider	Access to all enrollment actions and self- service for all the Medicaid IDs assigned to the Administrator who provisioned the Power Agent.	☑	☑
Power Agent Access Mgmt	Provision (add, edit, and deactivate) other Power Agents.	☑	☑
Power Agent Access Mgmt	Complete the global Administrator change process.	☑	☑
New Provider ?	Begin a new enrollment application on behalf of the Administrator who provisioned the Power Agent role.	☑	☑
Account Administration	Add, edit, and deactivate Provider Agents and their roles/actions per Medicaid ID.		☑
Account Administration	Reassign the Administrator role of a single Medicaid ID to another Administrator.		☑
Agent Bulk Upload	Assign multiple Agent's roles/actions to multiple Medicaid IDs in one bulk upload.		☑

Note:
Access Management can be granted or deactivated at any time under the Power Agent Provisioning History section; See step 1.2 of this QRG.
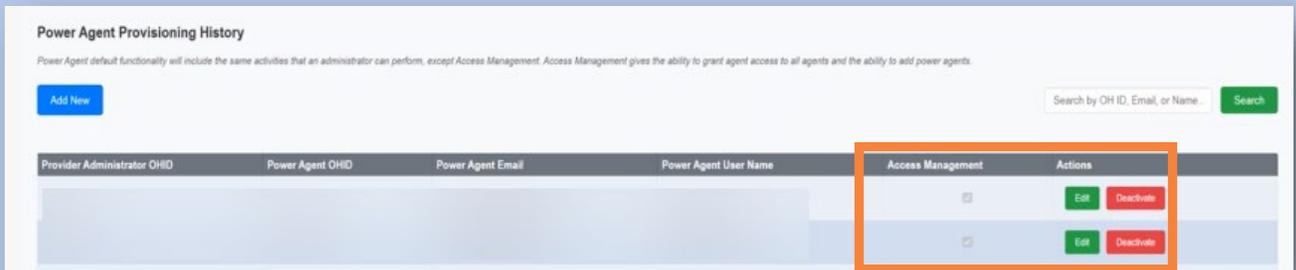
4 Additional Resources

- For more details on the new Power Agent Role, please refer to the Power Agent User Guide on the PNM Learning Page.

- If you are new to creating registrations, please see the **New Provider Application QRG** on the PNM Learning Page for step-by-step instructions.

- Information on the Global Administrator Change Process and scenarios for when and who should complete this process can be found on the PNM Learning Page .

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