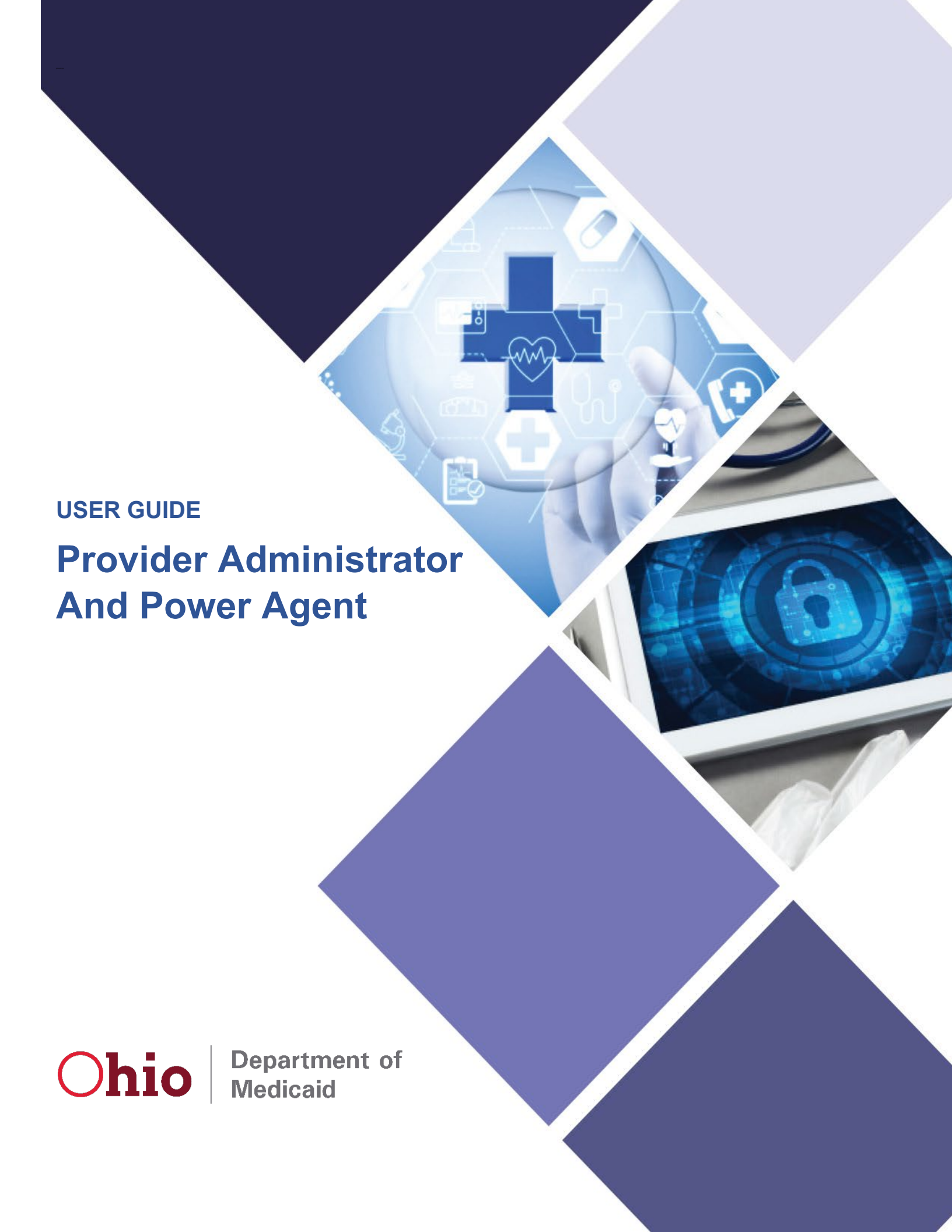


The cover features a collage of geometric shapes in various shades of blue and purple. A central diamond shape contains a collage of medical icons including a large blue cross, a heart with a pulse line, a stethoscope, a pill, a microscope, a clipboard, and a hand holding a heart. Below this, another diamond shape shows a hand interacting with a tablet displaying a blue padlock icon. The background is composed of several large, overlapping geometric shapes in dark blue, light blue, and purple.

USER GUIDE

Provider Administrator And Power Agent



Department of
Medicaid

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Introduction

This user guide explains the recent improvements made to the Provider Management (PNM) system and a detailed explanation of the new Power Agent role – designed to provide ease of use to the Provider Administrator role.

The Power Agent role in PNM will give designated provider agents broader access to perform nearly all administrative functions, including starting a new enrollment application, assigning Provider Agents, and provisioning Power Agents. 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.
- Ultimately, it is the responsibility of the Provider Administrator and the organization to manage how to utilize the new Power Agent role.

The new **Power Agent Access Mgmt** button is located on the Provider Administrator dashboard and is where a provider Administrator can begin assigning Power Agents.

- **Delegated Provider Administrators** may assign up to **10 Power Agents**
- **All other Provider Administrators** may assign up to **5 Power Agents**
- If a Power Agent is provisioned with “Access Management”, then the **Power Agent Access Mgmt** button will allow a provisioned Power Agent to provision other Power Agents.
 - A Power Agent provisioned with “Access Management” can also use the **Power Agent Access Mgmt** button to reassign the entire portfolio of an Administrator to another Administrator, or Power Agent. This functionality is to help when a Provider Administrator leaves. Upon completion of the process, the new “global” administrator will be assigned to the associated provider accounts.

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.

If a Power Agent is provisioned by multiple Provider Administrators, then the Power Agent can use the **Switch Administrator** button to switch back and forth between the dashboard views for each Administrator that has

provisioned the Power Agent. When using the **Switch Administrator** button, the selected Administrator will display for the Power Agent a dashboard with the Medicaid IDs assigned to that Administrator.

- If a Provider Agent is a Power Agent to one administrator and has other Provider Agent assignments to other administrators, they will see **Switch Administrator** button.
- Previously the **Account Administration** button was reserved for Administrators only, but it is now also available for Provisioned Power Agents. An enhanced provider Account Administration screen allows for the ease of Provider Agent searching, assigning Agents, reassigning a Provider Administrator, and navigating the roles/actions assigned for each Medicaid ID in PNM.
- Search by **Medicaid ID** of a Provider that needs the Provider Agent roles updated or a new Provider Agent added.
- Search by **Agent ID** to retrieve all Medicaid IDs where the Agent is currently assigned as a Provider Agent.
- Search by **Agent Sub Role** to view all the Provider Agents with that role. Agent Sub Role Examples: Enrollment Agent, Claim Search, Claim Submission, 1099 Information, EFT Agent, and Eligibility.
- Important Updates have been made to the Enrollment Agent role and the EFT Agent role.
 - The '**Enrollment Agent**' role now includes the ability to respond to a Return to Provider (RTP) situation on an initial new enrollment application.
 - The '**EFT Agent**' role now has access to view and make updates to the Electronic Funds Transfer (EFT) page.

Instead of assigning Provider Agents to a Medicaid ID one at a time, a Power Agent or Administrator can upload all Agent assignments in one bulk document to PNM using the **Agent Bulk Upload** button.

- To begin the process the Agent Bulk Upload Template and Agent Role List need to be downloaded from PNM.
- The Reference tab at the bottom of the template contains the exact formatting to use in the rows on the template.
- The Agent Role List contains the exact wording to be used on the Agent Bulk Upload Template for each Agent role that needs added or deleted on the template.
- The template is completed and uploaded to PNM using the **Agent Bulk Upload** button.

References can be found on the [Learning page](#) of PNM:

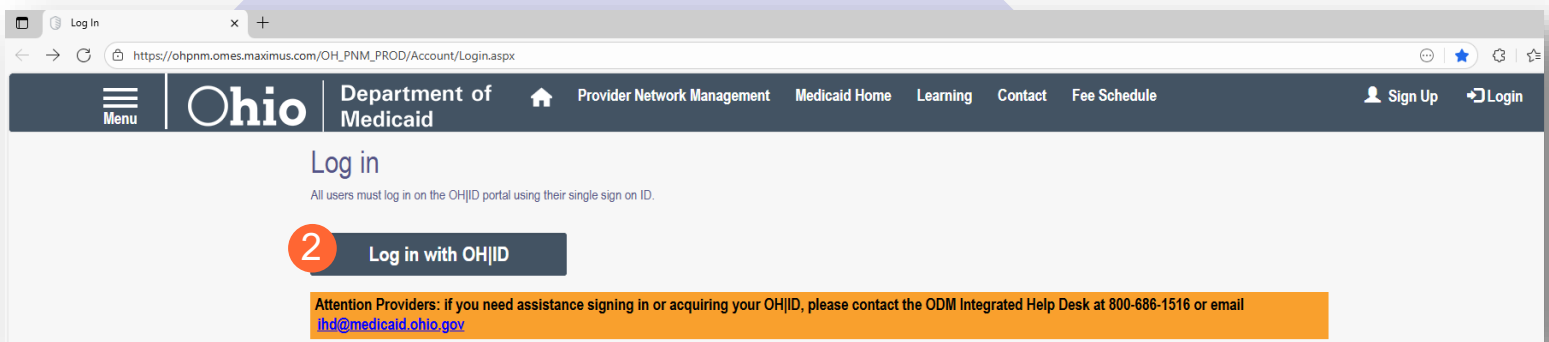
- [QRG: PNM Enhancements and Power Agent Role](#)
- [QRG: Bulk Agent Upload](#)
- [QRG: Power Agent Assignment & Actions](#)
- [QRG: Global Administrator Change Process](#)
- QRG: Agent Assignment & Actions

Initial PNM Login

In this section of the user manual we will review how to log into PNM. All users will log into the PNM system by using an OHID (Ohio ID).

Step 1: Visit the PNM web address: https://ohpnm.omes.maximus.com/OH_PNM_PROD/Account/Login.aspx

Step 2: Click “Log in with OHID”.



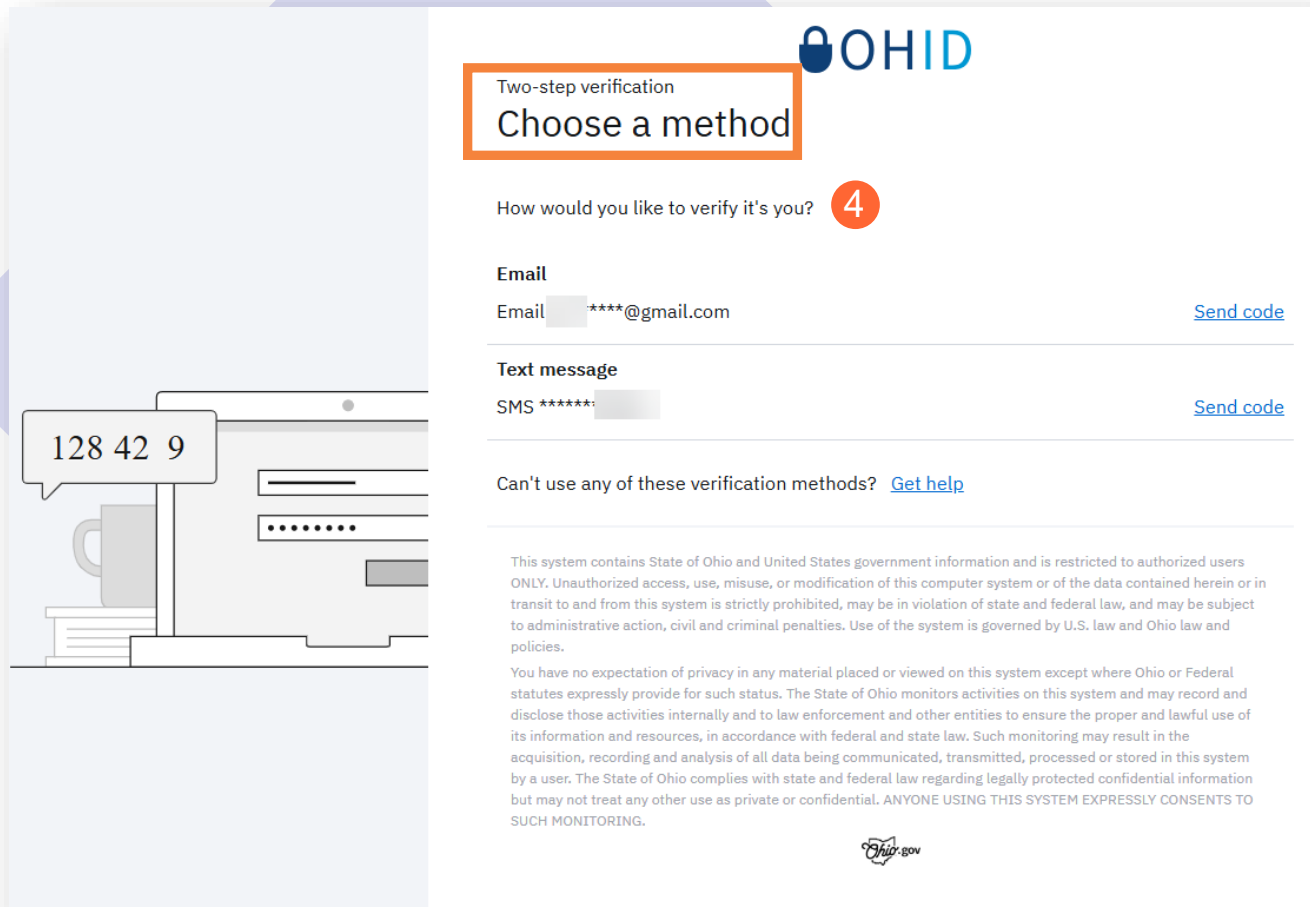
Step 3: Enter your OHID username and password on login screen illustrated below, and then click “Login”.

NOTE: If you do not have an OHID, then view the Quick Reference Guide (QRG) [Creating OH ID for IOP PNM Login](#) found on the “[Learning](#)” Page of PNM.

A screenshot of the OHID (Ohio's digital identity) login form. The form is white with a blue header featuring the OHID logo and the text "Ohio's digital identity. One state. One account." Below this is the instruction "Register once, use across many State of Ohio websites." The form contains two input fields: "OHID username" and "Password". Below the password field is a blue button labeled "Login" with a red circle containing the number "3" to its left. Below the button is a link: "Forgot your OHID username or password?". At the bottom of the form is a link: "Do you need an OHID? Get started here." with a button labeled "Create account".

Step 4: The next screen is used to verify your identity before entering into PNM. A two-step verification method is used. You need to have your 2 methods of verification set up before successfully logging into PNM.

NOTE: If you do not have your 2 methods of verification set up, then view the [Multifactor Authentication \(MFA\) 2-Step Verification – Job Aid](#) found on the [Learning](#) Page of PNM.



OHID

Two-step verification
Choose a method

How would you like to verify it's you? **4**

Email
Email *****@gmail.com [Send code](#)

Text message
SMS ***** [Send code](#)

Can't use any of these verification methods? [Get help](#)

This system contains State of Ohio and United States government information and is restricted to authorized users ONLY. Unauthorized access, use, misuse, or modification of this computer system or of the data contained herein or in transit to and from this system is strictly prohibited, may be in violation of state and federal law, and may be subject to administrative action, civil and criminal penalties. Use of the system is governed by U.S. law and Ohio law and policies.

You have no expectation of privacy in any material placed or viewed on this system except where Ohio or Federal statutes expressly provide for such status. The State of Ohio monitors activities on this system and may record and disclose those activities internally and to law enforcement and other entities to ensure the proper and lawful use of its information and resources, in accordance with federal and state law. Such monitoring may result in the acquisition, recording and analysis of all data being communicated, transmitted, processed or stored in this system by a user. The State of Ohio complies with state and federal law regarding legally protected confidential information but may not treat any other use as private or confidential. ANYONE USING THIS SYSTEM EXPRESSLY CONSENTS TO SUCH MONITORING.



Step 5: The next screen you will click “Yes, I have read the agreement” to continue logging into PNM.

5

Terms

This system contains State of Ohio Department of Medicaid information and is restricted to authorized users ONLY. Per the OH|ID terms and conditions you agreed to when signing up for your user credentials you are certifying that you are the individual owner and user of your OH|ID account used to access this system. You are responsible for all activities occurring under your account. Whoever knowingly or intentionally accesses a computer or computer system without authorization or exceeds the access to which that person is authorized, and by means of such access, obtains, alters, damages, destroys, or discloses information, or prevents authorized use of the information, shall be subject to such penalties allowed by law or policy.

In the event of a violation of law or policy, or because of any suspicious activity occurring on your OH|ID account, we may refuse service, terminate account access, or cancel transactions related to your OH|ID account.

All activities on this system may be recorded and/or monitored. Anyone using this system expressly consents to such monitoring. Users who access this system consent to the provisions of confidentiality of the information being accessed, but have no expectation of privacy while using this system.

In the event you discover that you can access any information to which you are not entitled, you must immediately contact ihd@medicaid.ohio.gov

☐ Yes, I have read the agreement

Cancel

Step 6: After clicking “Yes, I have read the agreement” you will be directed to the Provider Administrator dashboard. There are two new buttons, and the Account Administration button has new functionality.

6

My Providers

Power Agent Access Mgmt

Account Administration

Affiliate Update

Agent Bulk Upload

New Provider ?

Reg ID	Provider	Status	Provider Type	NPI	Medicaid ID	Specialty	DD Contract Number	DD Facility Number	Location	Effective Date	Submit Date	Revalidation Due Date
209987	JENNYFERA	Submitted	20 - Physician/Osteo Individual		4592357	ORTHOPEDIC SURGERY				06/17/2021	06/08/2025	03/30/2024

NOTE: 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 functionality. Ultimately, it is the responsibility of the Provider Administrator and the organization to manage how to utilize the new functionality.

NEW BUTTON - Power Agent Access Management – Provision and manage who is a Power Agent. Plus, this button allows a Provider Administrator or Power Agent the ability to globally change one entire Administrator’s portfolio to another Administrator. The Power Agent role in PNM gives designated provider agents broader access to perform nearly all administrative functions. This will offer enhanced administrative flexibility for organizations that need more than one person to have Administrator capabilities — especially for organizations managing large numbers of agents.

IMPROVED BUTTON - Account Administration – enhancements for managing and searching for Provider Agents and their actions/roles for each Medicaid ID. Plus, a streamlined process for reassigning a single Administrator in PNM.

NEW BUTTON - Agent Bulk Upload – Upload Provider Agents and their actions/roles in one ‘bulk’ form.

NEW BUTTON - Affiliate Update – Will appear for Delegated Providers only.

NOTE: Delegated Administrators are expected to proactively define and maintain internal processes for managing the Affiliate Update button, ensuring changes are handled accurately and consistently to support effective oversight. Organizations should consider conducting internal training for how to utilize the Power Agent role and access to the Affiliate update button within the organization.

Enable Power Agents for the First Time as the Administrator

Step 1: To enable Power Agents, click the **Power Agent Access Management** button from the Administrator dashboard.

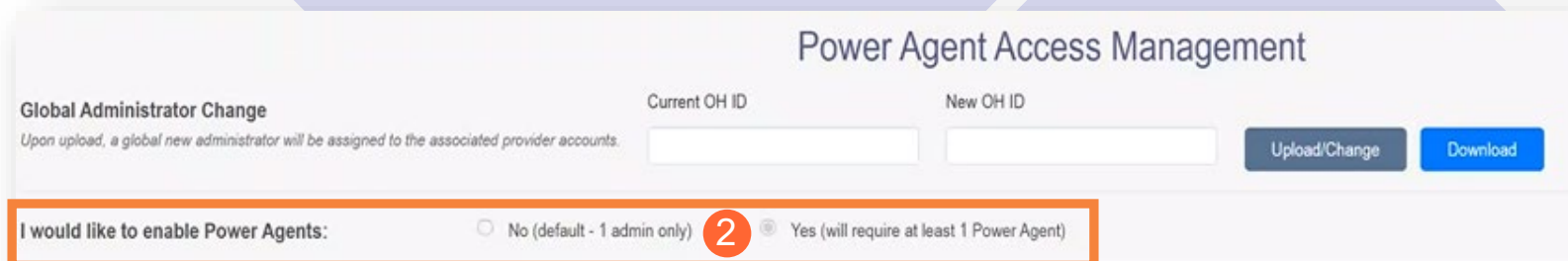
- Delegated Provider Administrators may assign up to 10 Power Agents
- All other Provider Administrators may assign up to 5 Power Agents



My P... 1 Power Agent Access Mgmt Account Administration Affiliate Update Agent Bulk Upload New Provider ?

Reg ID	Provider	Status	Provider Type	NPI	Medicaid ID	Specialty	DD Contract Number	DD Facility Number	Location	Effective Date	Submit Date	Revalidation Due Date
209987	JENNYFERA	Submitted	20 - Physician/Osteo Individual		4592357	ORTHOPEDIC SURGERY				06/17/2021	06/08/2025	03/30/2024

Step 2: Click the circle next to **Yes, will require at least 1 Power Agent**.



Power Agent Access Management

Global Administrator Change
Upon upload, a global new administrator will be assigned to the associated provider accounts.

Current OH ID: New OH ID:

I would like to enable Power Agents: ☐ No (default - 1 admin only) 2 ☒ Yes (will require at least 1 Power Agent)

NOTE: 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 Power Agent role. Ultimately, it is the responsibility of the Provider Administrator and the organization to manage how to utilize the new Power Agent role.

Adding a New Power Agent

Step 1: Click Add New.



Power Agent Access Management

I would like to enable Power Agents: ☐ No (default - 1 admin only) ☒ Yes (will require at least 1 Power Agent)

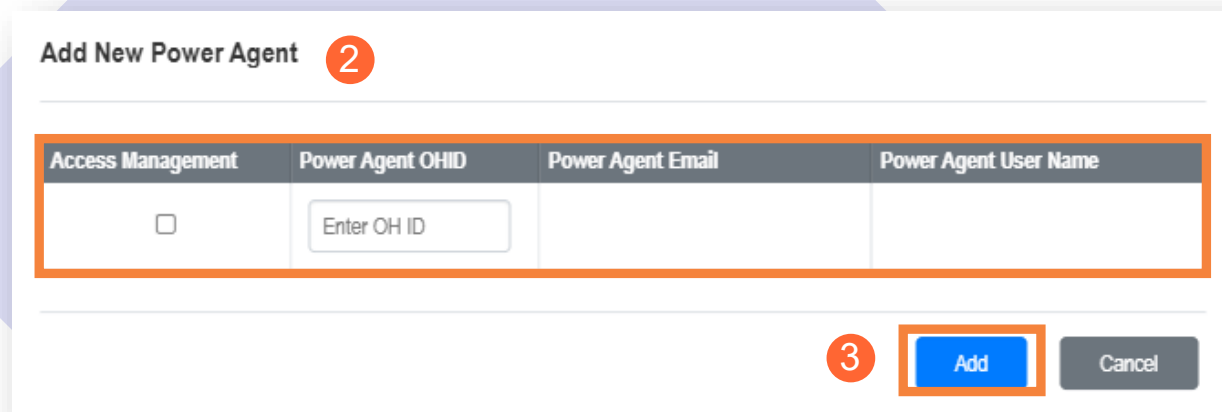
Power Agent Provisioning History

Power Agent default functionality will include the same activities that an administrator can perform, except Access Management. Access Management gives the ability to grant agent access to all agents and the ability to add power agents.

1

Step 2: In the Add New Power Agent pop-up enter or select:

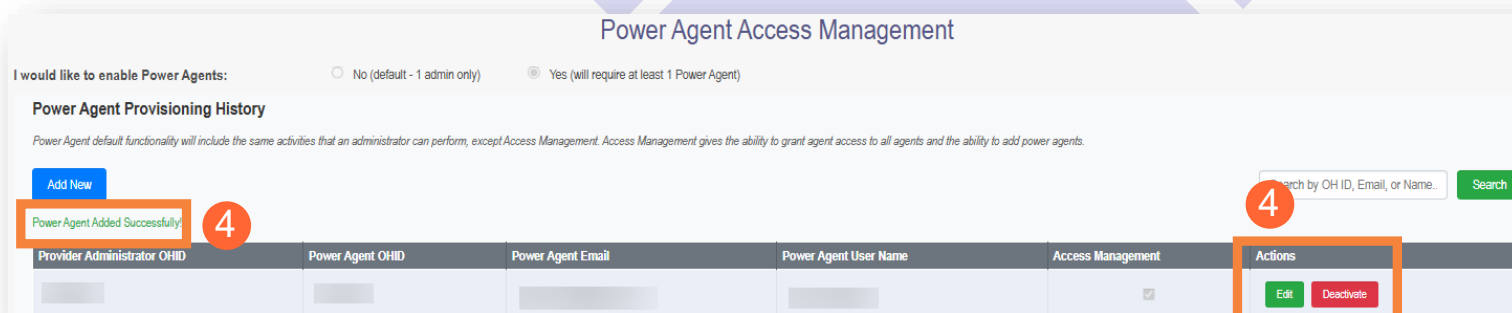
- The OHID of the provider Agent that you would like to provision to be a Power Agent.
- The email associated with the Agent's OHID.
- The User Name of the Power Agent.
- **Optional:** Checking the **Access Management** box allows the provisioned Power Agent to provision other Power Agents, assign Agent roles/actions, reassign the Provider Administrator for a Medicaid ID, and in the event an Admin leaves, this option allows the Power Agent the ability to globally change the Administrators dashboard portfolio to another Admin or Power Agent.



The image shows a pop-up window titled "Add New Power Agent" with a red circle containing the number 2. The form has four columns: "Access Management", "Power Agent OHID", "Power Agent Email", and "Power Agent User Name". The "Access Management" column contains a checkbox. The "Power Agent OHID" column contains a text input field with the placeholder "Enter OH ID". The "Power Agent Email" and "Power Agent User Name" columns are empty. At the bottom right, there is a blue "Add" button (circled with a red 3) and a grey "Cancel" button.

Step 3: Click the **Add** button.

Step 4: The **Power Agent Added Successfully** message will appear under the **Add New** button - The Power Agent will be added to the Power Agent Provisioning History section and appear with **Edit** and **Deactivate** buttons in the Actions column.



The image shows the "Power Agent Access Management" dashboard. At the top, there is a section "I would like to enable Power Agents:" with two radio buttons: "No (default - 1 admin only)" and "Yes (will require at least 1 Power Agent)". Below this is the "Power Agent Provisioning History" section. On the left, there is a blue "Add New" button. Below it, a green message box says "Power Agent Added Successfully" (circled with a red 4). The main table has columns: "Provider Administrator OHID", "Power Agent OHID", "Power Agent Email", "Power Agent User Name", "Access Management", and "Actions". The "Access Management" column has a checkbox. The "Actions" column has two buttons: "Edit" (green) and "Deactivate" (red) (circled with a red 4). At the top right, there is a search bar with the placeholder "Search by OH ID, Email, or Name..." and a green "Search" button.

NOTE: Delegated Provider Administrators may assign up to 10 Power Agents.

NOTE: All other Provider Administrators may assign up to 5 Power Agents.

Update Power Agent “Access Management” and How to De-Activate a Power Agent

The decision to provision a Power Agent with or without Access Management can be made when the Agent is initially provisioned as a Power Agent or later using the update function.

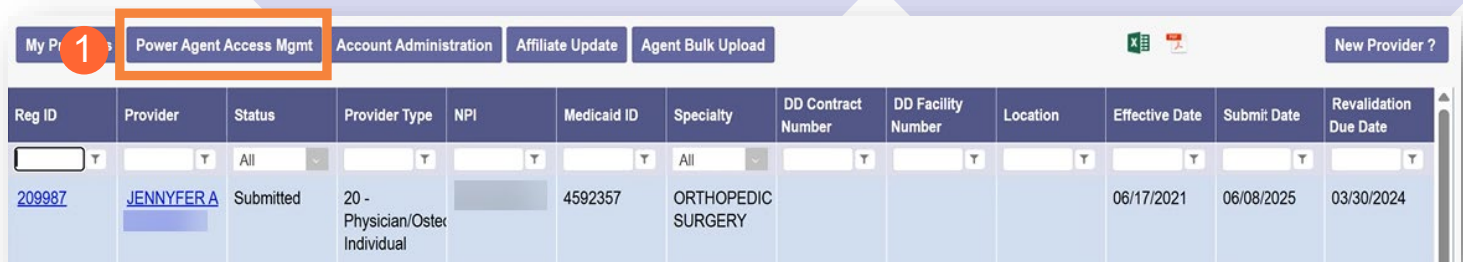
NOTE: It is optional to grant a Power Agent with Access Management. A Power Agent without Access Management will still have full Administrator access to Enrollment Actions and Self Service options for each Medicaid ID assigned to the provisioning Administrator.

Checking the **Access Management** box allows the provisioned Power Agent to provision other Power Agents, assign Agent roles/actions, reassign the Provider Administrator for a Medicaid ID, and in the event an Administrator leaves, this option allows the Power Agent the ability to globally change the Administrators dashboard portfolio to another Administrator or Power Agent.

NOTE: A Power Agent without **Access Management** will only have access to provider enrollment information of the Medicaid IDs assigned to the Administrator that provisioned the Power Agent as a Power Agent.

Update Power Agent Access Management

Step 1: To update who is provisioned as a Power Agent or which Power Agents have Access Management, click the **Power Agent Access Management** button from the dashboard.



Reg ID	Provider	Status	Provider Type	NPI	Medicaid ID	Specialty	DD Contract Number	DD Facility Number	Location	Effective Date	Submit Date	Revalidation Due Date
209987	JENNYFERA	Submitted	20 - Physician/Oster Individual		4592357	ORTHOPEDIC SURGERY				06/17/2021	06/08/2025	03/30/2024

Step 2: To update Access Management for a Power Agent, click the **Edit** button in the Actions column.

Power Agent Access Management

I would like to enable Power Agents: ☐ No (default - 1 admin only) ☒ Yes (will require at least 1 Power Agent)

Power Agent Provisioning History

Power Agent default functionality will include the same activities that an administrator can perform, except Access Management. Access Management gives the ability to grant agent access to all agents and the ability to add power agents.

[Add New](#) [Search](#)

Provider Administrator OHID	Power Agent OHID	Power Agent Email	Power Agent User Name	Access Management	Actions
[Redacted]	[Redacted]	[Redacted]	[Redacted]	☒	2 Edit Deactivate
[Redacted]	[Redacted]	[Redacted]	[Redacted]	☒	Edit Deactivate
[Redacted]	[Redacted]	[Redacted]	[Redacted]	☒	Edit Deactivate

Step 3: In the **Access Management** column, check the box to grant Access Management to the Power Agent or uncheck the Access Management box to remove Access Management from the Power Agent.

NOTE: Checking the **Access Management** box allows the provisioned Power Agent to provision other Power Agents, assign Agent roles/actions, reassign the Provider Administrator for a Medicaid ID, and in the event a Admin leaves unexpectedly, this option allows the Power Agent the ability to globally change the Administrators dashboard portfolio to another Admin or Power Agent.

Step 4: Click the **Save** button.

Power Agent Access Management

Global Administrator Change

Upon upload, a global new administrator will be assigned to the associated provider accounts.

Current OH ID: New OH ID: [Upload/Change](#) [Download](#)

I would like to enable Power Agents: ☐ No (default - 1 admin only) ☒ Yes (will require at least 1 Power Agent)

Power Agent Provisioning History

Power Agent default functionality will include the same activities that an administrator can perform, except Access Management. Access Management gives the ability to grant agent access to all agents and the ability to add power agents.

[Add New](#) [Search](#)

Provider Administrator OHID	Power Agent OHID	Power Agent Email	Power Agent User Name	Access Management	Actions
[Redacted]	[Redacted]	[Redacted]	[Redacted]	3 ☒	4 Save Cancel
[Redacted]	[Redacted]	[Redacted]	[Redacted]	☐	Edit Deactivate
[Redacted]	[Redacted]	[Redacted]	[Redacted]	☒	Edit Deactivate

NOTE: -The **Power Agent Updated Successfully** message will appear under the **Add New** button. The **Edit** and **Deactivate** buttons will return to the Actions column after clicking the **Save** button.

I would like to enable Power Agents: ☐ No (default - 1 admin only) ☒ Yes (will require at least 1 Power Agent)

Power Agent Provisioning History

Power Agent default functionality will include the same activities that an administrator can perform, except Access Management. Access Management gives the ability to grant agent access to all agents and the ability to add power agents.

[Add New](#)

Search by OH ID, Email, or Name.. [Search](#)

Power Agent Updated Successfully!

Provider Administrator OHID	Power Agent OHID	Power Agent Email	Power Agent User Name	Access Management	Actions
				☒	Edit Deactivate

Deactivate (Deprovision) a Power Agent

To de-provision (unassign) the Power Agent role from a PNM user, use the Deactivate button.

NOTE: Delegated Provider Administrators may assign up to 10 Power Agents

NOTE: All other Provider Administrators may assign up to 5 Power Agents

Step 1: To deactivate the Power Agent, click the **Deactivate** button in the Actions column.

Power Agent Access Management

I would like to enable Power Agents: ☐ No (default - 1 admin only) ☒ Yes (will require at least 1 Power Agent)

Power Agent Provisioning History

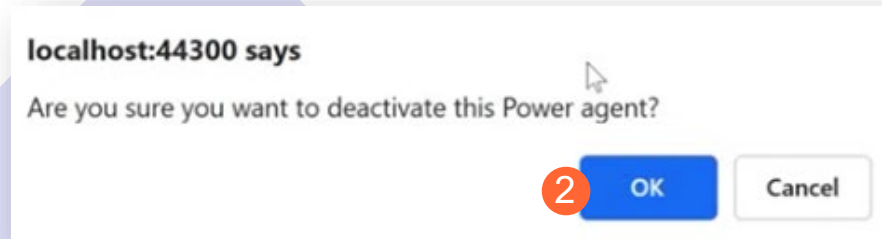
Power Agent default functionality will include the same activities that an administrator can perform, except Access Management. Access Management gives the ability to grant agent access to all agents and the ability to add power agents.

[Add New](#)

Search by OH ID, Email, or Name.. [Search](#)

Provider Administrator OHID	Power Agent OHID	Power Agent Email	Power Agent User Name	Access Management	Actions
				☒	Edit Deactivate
				☒	Edit Deactivate
				☒	Edit Deactivate

Step 2: On the pop-up click **OK** that Yes, you are sure you want to deactivate the Power Agent.



NOTE: The **Power Agent De-Activated Successfully** message will appear under the **Add New** button. The Power Agent will be removed from Power Agent Provisioning History section.

Power Agent Access Management

I would like to enable Power Agents: ☐ No (default - 1 admin only) ☒ Yes (will require at least 1 Power Agent)

Power Agent Provisioning History

Power Agent default functionality will include the same activities that an administrator can perform, except Access Management. Access Management gives the ability to grant agent access to all agents and the ability to add power agents.

[Add New](#) [Search](#)

Power Agent De-Activated Successfully!

Provider Administrator OHID	Power Agent OHID	Power Agent Email	Power Agent User Name	Access Management	Actions
				☒	Edit Deactivate

Switching Administrators as a Power Agent with Multiple Administrators and Power Agent Dashboard Functionality

If you are provisioned as a Power Agent by a Provider Administrator, then your dashboard will include only the Medicaid IDs assigned to that Administrator. When a Power Agent is provisioned by multiple Provider Administrators, they must choose which Provider Administrator account to work in before accessing their dashboard. If you are made a Power Agent by more than one Administrator, then you will have an additional button called, the **Switch Administrator** button.

Switching Administrators as a Power Agent with Multiple Administrators

Step 1: If a Power Agent is provisioned by multiple Provider Administrators, when logging in, they must choose which Provider Administrator account to work in **before** accessing their dashboard.

NOTE: If a Power Agent is not provisioned by more than one Administrator, then they will not need to select the Provider Administrator when logging into PNM. The Power Agent will be immediately directed to their Power Agent dashboard displaying the Medicaid IDs assigned to the Administrator that provisioned them as a Power Agent.

Select Provider Administrator

1 The Power Agent is associated with multiple Provider Administrators. Which Provider Administrator account would you like to manage?

Provider Administrator OHID:

2 OK Cancel

3

Step 2: Select the appropriate **Provider Administrator OHID** from the drop-down menu.

NOTE: If a Provider Agent is a Power Agent to one administrator and has other Provider Agent assignments to other administrators, they will see **Switch Administrator** button.

Step 3: Click **OK**.

NOTE: The dashboard appears with the Medicaid IDs assigned to the Administrator who was selected from the drop-down menu and the Switch Administrator button is available from the Power Agent's dashboard.

My Providers

Power Agent Access Mgmt

Account Administration

Affiliate Update

Agent Bulk Upload

Switch Administrator

New Provider

Now displaying for Administrator

4

Reg ID	Provider	Status	Provider Type	NPI	Medicaid ID	Specialty	DD Contract Number	DD Facility Number	Location	Effective Date	Submit Date	Revalidation Due Date
		All				All						
		Complete	Behavioral Health Para-Professionals			QUALIFIED MH SPECIALIST 3				07/15/2024	07/31/2024	07/15/2029

Step 4: If you need to switch to the Medicaid IDs assigned to a different Provider Administrator, click the **Switch Administrator** button.

Step 5: Select the **Provider Administrator OHID** from the drop-down menu.

Select Provider Administrator

The Power Agent is associated with multiple Provider Administrators.
Which Provider Administrator account would you like to manage?

Provider Administrator OHID:

5

6

OK

Cancel

Step 6: Click **OK**.

My Providers Power Agent Access Mgmt Account Administration Affiliate Update Agent Bulk Upload Switch Administrator New Provider												
Now displaying for Administrator												
Reg ID	Provider	Status	Provider Type	NPI	Medicaid ID	Specialty	DD Contract Number	DD Facility Number	Location	Effective Date	Submit Date	Revalidation Due Date
		All				All						
		Complete	Physician/Other Individual			DIAGNOSTIC RADIOLOGY				12/27/2024	09/21/2025	12/27/2029
		Complete	Nurse Practitioner Individual			Family Practice				04/24/2025	07/15/2025	04/24/2030

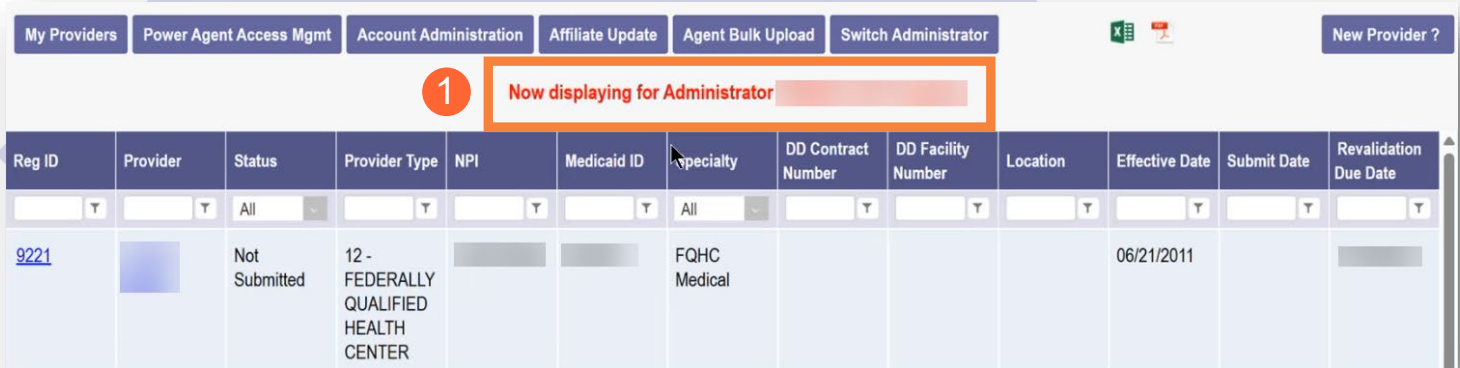
NOTE: The dashboard appears with the Medicaid IDs assigned to the Administrator who was selected from the drop-down menu.

New Provider Button: Start a New Enrollment Application as a Power Agent

A Power Agent can begin a new enrollment application on behalf of the Administrator who made the Power Agent a Power Agent.

Step 1: The Power Agent needs to be logged in and displaying the appropriate Administrator's dashboard that the new application is to start on behalf of.

NOTE: If the Administrator displaying on the dashboard is not the Administrator you want to begin a new enrollment application on behalf of, then click the **Switch Administrator** button, select the appropriate Administrator, and click **OK**.

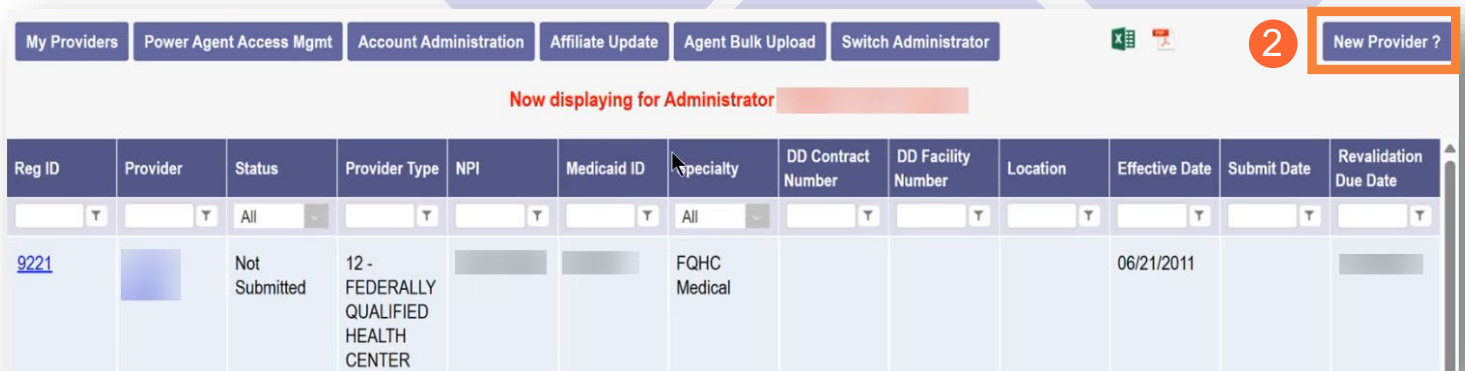


My Providers Power Agent Access Mgmt Account Administration Affiliate Update Agent Bulk Upload Switch Administrator New Provider ?

1 Now displaying for Administrator

Reg ID	Provider	Status	Provider Type	NPI	Medicaid ID	Specialty	DD Contract Number	DD Facility Number	Location	Effective Date	Submit Date	Revalidation Due Date
9221		Not Submitted	12 - FEDERALLY QUALIFIED HEALTH CENTER			FQHC Medical				06/21/2011		

Step 2: To begin a new enrollment application From the Power Agent dashboard, click the **New Provider?** button.



My Providers Power Agent Access Mgmt Account Administration Affiliate Update Agent Bulk Upload Switch Administrator New Provider ?

2 New Provider ?

Now displaying for Administrator

Reg ID	Provider	Status	Provider Type	NPI	Medicaid ID	Specialty	DD Contract Number	DD Facility Number	Location	Effective Date	Submit Date	Revalidation Due Date
9221		Not Submitted	12 - FEDERALLY QUALIFIED HEALTH CENTER			FQHC Medical				06/21/2011		

Step 3: Continue the new provider application process following the appropriate resource from the [“Learning”](#) page of PNM under the “Quick Reference Guides” section.

- [Quick Reference Guide: New Provider Application](#)
- [Quick Reference Guide: DODD New Provider Application](#)
- [Quick Reference Guide: ODA New Provider Application](#)
- [Quick Reference Guide: Entering New Type 19 Tile Application in PNM](#)

Account Administration Button: Enhanced Agent Provisioning (Assigning), Updating, and Searching for Administrators and Power Agents (with Access Management)

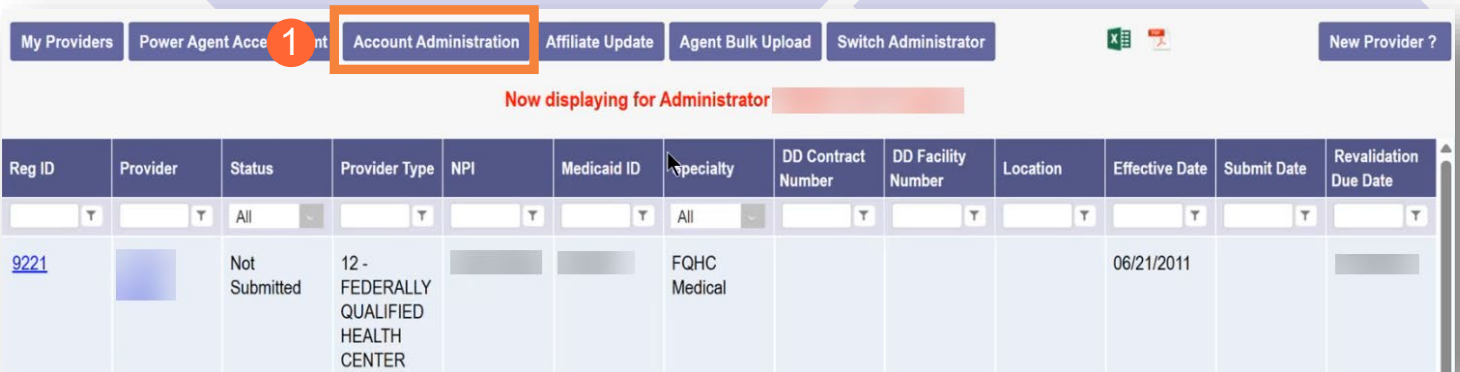
Provider Administrators and Provisioned Power Agents (with Access Management) will have access to the **Account Administration** button. The Account Administration button will go to an enhanced provider **Account Administration** screen that allows for the ease of Provider Agent searching, Provider Administrator Reassignment, Agent assigning, and navigating for each Medicaid ID in PNM.

- The enhancements made to the Account Administration button work well when adding or updating individual Agents, or if you have a smaller organization with fewer Agents to manage.
- The new Agent Bulk Upload button ([see Agent Bulk Upload section](#)) provides an option for larger organizations that would prefer to upload Agent assignment/role additions and updates in bulk instead of individually through the **Account Administration** button.

NOTE: Power Agents are NOT provisioned using the Account Administration button.

Adding a New Provider Agent to a Medicaid ID

Step 1: To begin to assign a new Agent, click the Account Administration button from the Power Agent dashboard or the Provider Administrator dashboard.



The screenshot shows a dashboard with several buttons: "My Providers", "Power Agent Access", "Account Administration", "Affiliate Update", "Agent Bulk Upload", "Switch Administrator", and "New Provider?". The "Account Administration" button is highlighted with a red box, and a red circle with the number "1" is placed over it. Below the buttons, there is a red bar that says "Now displaying for Administrator". Below this bar is a table with the following columns: 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:

Reg ID	Provider	Status	Provider Type	NPI	Medicaid ID	Specialty	DD Contract Number	DD Facility Number	Location	Effective Date	Submit Date	Revalidation Due Date
9221		Not Submitted	12 - FEDERALLY QUALIFIED HEALTH CENTER			FQHC Medical				06/21/2011		

NOTE: If the Administrator displaying on the dashboard is not the Administrator assigned the Medicaid ID for the provider you need to Add a new agent for, then click the **Switch Administrator** button, select the appropriate Administrator, and click **OK**.

Step 2: Select the **Medicaid ID** for the Provider you are adding a new Agent for.

The screenshot shows the 'Provider Account Administration' form. The 'Medicaid ID' dropdown menu is highlighted with an orange box and a red circle with the number 2. The 'Agent Sub Role' dropdown menu is also visible. At the bottom right, the 'Search' button is highlighted with an orange box and a red circle with the number 3. Other buttons include 'Add New Agent', 'Reassign Admin', and 'Clear'.

Step 3: Click the **Search** button.

Step 4: Any Agents already assigned to the Medicaid ID will be listed. If there are no Agents assigned to the Medicaid ID yet, then you will see the message, **“No Agents found for the search criteria selected.”**

To add a new Agent to the Medicaid ID, click the **Add New Agent** button.

The screenshot shows the 'Provider Account Administration' form after a search. The 'Medicaid ID' dropdown menu is highlighted with an orange box. A red circle with the number 4 points to the 'Add New Agent' button, which is also highlighted with an orange box. A message box on the left, also highlighted with an orange box and a red circle with the number 4, states 'No agents found for the search criteria selected.' Below this message, it says 'Showing 1 to 1 of 1 Entries'. The 'Search' button is also visible.

Step 5: In the **Agent Information** pop-up enter:

- The Agent OHID
- The Agent Email associated with the Agent OHID
- The Medicaid ID of the provider the Agent is being assigned to.

The screenshot shows the 'Agent Information' pop-up form. The form has three input fields: 'Agent OHID', 'Agent Email', and 'Medicaid ID'. Each field has a placeholder text 'Enter Agent OHID', 'Enter Agent OHID Email', and 'Enter Medicaid ID' respectively. At the bottom right, the 'Add Agent' button is highlighted with an orange box and a red circle with the number 6. The 'Close' button is also visible.

Step 6: Click the **Add Agent** button.

Step 7: Check the box next to the Agent roles that are to be assigned for the Agent and Medicaid ID listed.

NOTE: Updated Agent Roles:

- **'Enrollment Agent'** role now includes the ability to respond to a Return to Provider (RTP) on an initial new enrollment application.
- **'EFT Agent'** role will now have access to view and make updates to the Electronic Funds Transfer (EFT) page.

NOTE: The Agent roles available for selection are related to the provider type of the Medicaid ID. If a role appears very light gray, then it is not available for selection for that provider type.

Step 8: After selecting the Agent roles for the Agent and Medicaid ID, scroll down and click the **Add Agent** button.

Provider Account Administration

User Information

Agent OHJID:

Agent Email:

Medicaid ID:

☒ 1099 Information

☐ Claim Submission

☒ Enrollment Agent

☐ Hospital Contact

☐ MDS Report

☐ Prepare Save LTC Cost Report

☐ Prior Authorization Submit

☐ RHC Cost Report Upload

☐ Sign Certify Hospital Cost Report

☐ Sign Certify RHC Cost Report

☐ View Hospital Cost Report

☐ View MSP Cost Report Due Date

☐ View Provider Reports

☐ View SURS

☐ APM Agent

☒ EFT Agent

☐ Hospice Enroll Maintenance

☐ Lead Investigation Cost Report Upload

☐ OHF Cost Report Upload

☐ Prepare Save MSP Cost Reports

☐ Provider Alternative Payment Model Agent

☐ Sign Approve LTC Cost Report

☐ Sign Certify MSP Cost Reports

☐ Trade Files

☐ View LI Cost Report

☐ View MSP Cost Reports

☐ View Remittance Advices

☐ Claim Search

☐ Cost Report Management Agent

☐ Eligibility

☐ Group Agent

☐ Hospice Enroll Search

☐ MCO Agent

☐ Prenatal Visit

☐ Prior Authorization Search

☐ Retrieve Reports

☐ Sign Certify FQHC Cost Report

☐ Sign Certify OHF Cost Report

☐ View FQHC Cost Report

☐ View LTC Cost Report

☐ View OHF Cost Report

☐ View RHC Cost Report

Step 9: An Agent listed with **Edit** and **Deactivate** buttons available has been successfully added.

Provider Account Administration

Medicaid ID:

Agent Sub Role:

Search Agent Sub Role...

Agent ID:

Search Agent ID...

Search

Add New Agent

Reassign Admin

Clear

9	Medicaid ID	Provider Name	Agent OH ID	Agent Name	Agent Roles
Edit Deactivate					Enrollment Agent,Hospital Contact,1099 Ir

Deactivate an Agent from a Medicaid ID

Step 1: To deactivate the new Agent from the Medicaid ID, click the corresponding **Deactivate** button.

Provider Account Administration

Medicaid ID:

Agent Sub Role:

Search Agent Sub Role...

Agent ID:

Search Agent ID...

Search

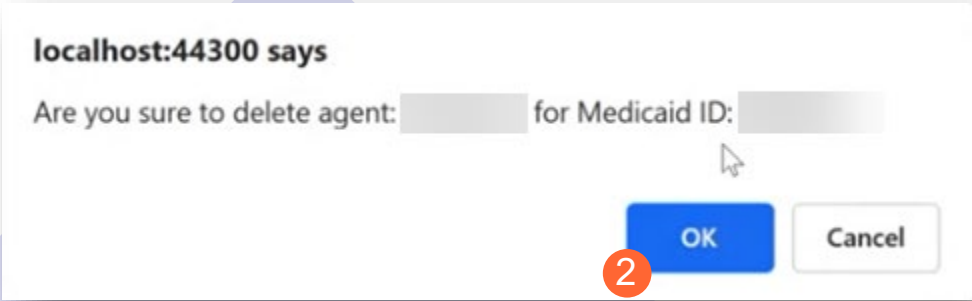
Add New Agent

Reassign Admin

Clear

1	Medicaid ID	Provider Name	Agent OH ID	Agent Name	Agent Roles
Edit Deactivate					Enrollment Agent,Hospital Contact,1099 Ir

Step 2: Click **OK** to confirm deactivating the Agent ID and Medicaid ID listed in the pop-up.



NOTE: The Agent will no longer be assigned to that provider Medicaid ID and the Agent will no longer see the Medicaid ID on their dashboard.

Update (Edit) Agent Roles for a Medicaid ID

Step 1: To update the roles assigned to an Agent, click the corresponding **Edit** button.

Provider Account Administration

Medicaid ID: [redacted]

Agent Sub Role: [Search Agent Sub Role...]

Agent ID: [Search Agent ID...]

Search

Add New Agent

Reassign Admin

Clear

1		Medicaid ID	Provider Name	Agent OH ID	Agent Name	Agent Roles
Edit	Deactivate	[redacted]	[redacted]	[redacted]	[redacted]	Enrollment Agent,Hospital Contact,1099 Ir

Step 2: The checkmarks seen next to each role display the roles are currently assigned to the Agent.

NOTE: The Agent roles available for selection are related the provider type of the Medicaid ID. If a role appears very light gray, then it is not available for selection for that provider type.

- To unassign a role, uncheck the box.
- To add a new role, check the box next to the role.

Agent OHID:

Agent Name:

Medicaid ID:

2 ☒ 1099 Information

☐ Claim Submission

☐ Deemed Eligibility

☐ Enrollment Agent

☐ Hosp Cost Report Upload

☐ Hospital Contact

☐ MDS Report

☐ Prepare Save LTC Cost Report

☐ Prior Authorization Submit

☐ RHC Cost Report Upload

☐ Sign Certify Hospital Cost Report

☐ Sign Certify RHC Cost Report

☐ View Hospital Cost Report

☐ View MSP Cost Report Due Date

☐ View Provider Reports

☐ View SURS

☐ APM Agent

☐ Correspondence

3 ☒ EFT Agent

☐ FQHC Cost Report Upload

☐ Hospice Enroll Maintenance

☐ Lead Investigation Cost Report Upload

☐ OHF Cost Report Upload

☐ Prepare Save MSP Cost Reports

☐ Provider Alternative Payment Model Agent

☐ Sign Approve LTC Cost Report

☐ Sign Certify MSP Cost Reports

☐ Trade Files

☐ View LI Cost Report

☐ View MSP Cost Reports

☐ View Remittance Advices

☐ Claim Search

☐ Cost Report Management Agent

☐ Eligibility

☐ Group Agent

☐ Hospice Enroll Search

☐ MCO Agent

☐ Prenatal Visit

☐ Prior Authorization Search

☐ Retrieve Reports

☐ Sign Certify FQHC Cost Report

☐ Sign Certify OHF Cost Report

☐ View FQHC Cost Report

☐ View LTC Cost Report

☐ View OHF Cost Report

☐ View RHC Cost Report

3

Step 3: When Agent Role selections are finalized, click the **Save** button.

Agent, Medicaid ID, and Sub Role Search Functionality

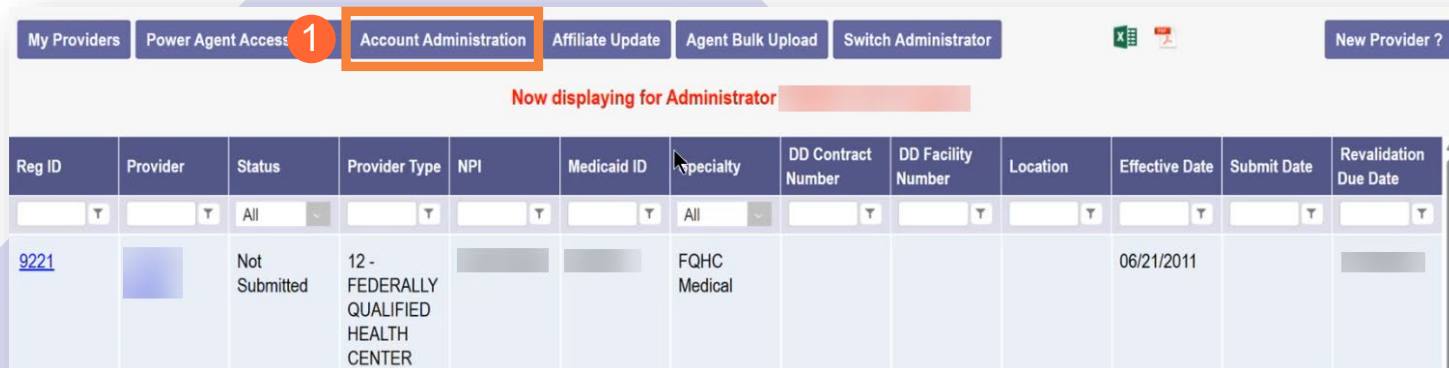
When Provider Administrators and Provisioned Power Agents (with Access Management) need to search for existing Agents, there are easier ways of doing so with the **Account Administration** button. Searching now includes the ability to be done by Medicaid ID, Agent ID, or Agent Sub Role.

NOTE: The enhancements made to the Account Administration button work well when adding or updating individual Agents, or if you have a smaller organization with fewer Agents to manage.

- The new Agent Bulk Upload button ([see Agent Bulk Upload section](#)) provides an option for larger organizations that would prefer to upload Agent assignment/role additions and updates in bulk instead of individually through the **Account Administration** button.

Step 1: Click the **Account Administration** button from dashboard.

NOTE: If the Administrator displaying on the dashboard is not the Administrator assigned the Medicaid ID for the provider you need to search for, then click the **Switch Administrator** button, select the appropriate Administrator, and click **OK**.

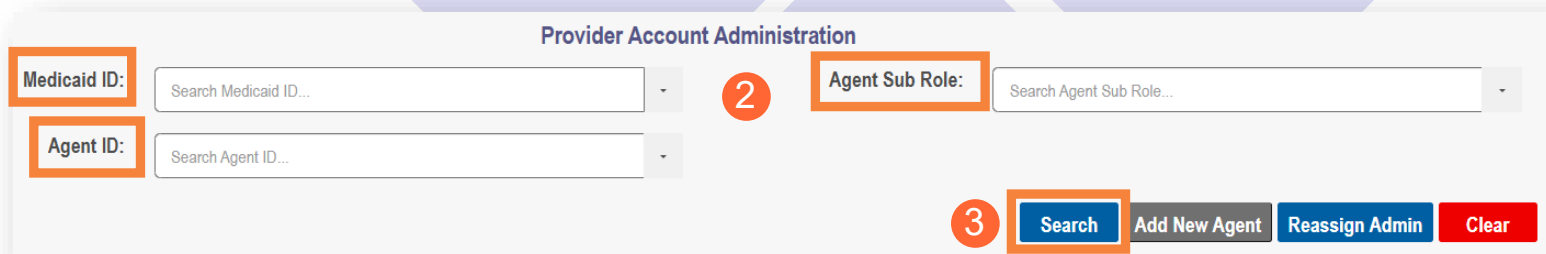


Now displaying for Administrator

Reg ID	Provider	Status	Provider Type	NPI	Medicaid ID	Specialty	DD Contract Number	DD Facility Number	Location	Effective Date	Submit Date	Revalidation Due Date
9221		Not Submitted	12 - FEDERALLY QUALIFIED HEALTH CENTER			FQHC Medical				06/21/2011		

Step 2: Enter one or more pieces of search criteria:

- Search by **Medicaid ID** of the Provider that needs the Provider Agent roles updates or a new Provider Agent added. More than one Med ID can be searched for at the same time.
- Search by **Agent ID** to retrieve all Medicaid IDs where the Agent is currently assigned as a Provider Agent. More than one Agent ID can be searched for at the same time.
- Search by **Agent Sub Role** to view all the Provider Agents with that role.



Provider Account Administration

Medicaid ID:

Agent ID:

Agent Sub Role:

Search Add New Agent Reassign Admin Clear

Step 3: Click the **Search** button.

NOTE: The search results will vary by search criteria, but each search result will contain Edit and Delete buttons, Medicaid ID, Provider name, Agent OHID, Agent Name, and Agent Roles.

- **Step 4A** displays search results using the Medicaid ID as the search criteria.
- **Step 4B** displays search results using the Agent Sub Role as the search criteria.
- **Step 4C** displays search results using the Agent ID as the search criteria.

Step 4A: The search results appear below the search criteria.

The image below shows search results using **Medicaid ID** as the search criteria. Each Agent assigned to the Medicaid ID will be displayed in the search results with each Agent Role listed in the Agent Roles column.

- Click the **Clear** button to clear the results and begin a new search.
- The Provider Agents listed in the search results will appear with **Edit** and **Deactivate** buttons.
 - To edit the Agent role(s) assigned to the Medicaid ID, click the **Edit** button.
 - To deactivate the Agent’s access to the selected Medicaid ID, click **Deactivate**.

Provider Account Administration

Medicaid ID:

Agent Sub Role:

Search Agent Sub Role...

Agent ID:

Search Agent ID...

4

A

Search

Add New Agent

Reassign Admin

Clear

		Medicaid ID	Provider Name	Agent OH ID	Agent Name	Agent Roles
Edit	Deactivate					Enrollment Agent,Hospital Contact,1099 Ir

Step 4B: The image below shows search results using **Agent Sub Role** as the search criteria. Each Agent with the selected Agent Sub Role will appear for any Medicaid ID assigned to the Administrator or Power Agent using the Agent Sub Role.

- Click the **Clear** button to clear the results and begin a new search.
- The Provider Agents listed in the search results will appear with **Edit** and **Deactivate** buttons.
 - To edit the Agent role(s) assigned to the Medicaid ID, click the **Edit** button.
 - To deactivate the Agent's access to the selected Medicaid ID, click **Deactivate**.

Provider Account Administration

Medicaid ID:

Agent ID:

Agent Sub Role:

Search **Add New Agent** **Reassign Admin** **Clear**

		Medicaid ID	Provider Name	Agent OH ID	Agent Name	Agent Roles
Edit	Deactivate		Dale			1099 Information
Edit	Deactivate		Dale			1099 Information
Edit	Deactivate		Dalton			1099 Information
Edit	Deactivate		Darell			1099 Information
Edit	Deactivate		Darell			1099 Information
Edit	Deactivate		Darell			1099 Information
Edit	Deactivate		Darell			1099 Information

Step 4C: The image below shows search results using the **Agent ID** search criteria. The Agent(s) selected will appear listed with each Medicaid ID they are an Agent for plus each role they are assigned for the Medicaid ID.

- Click the **Clear** button to clear the results and begin a new search.
- The Provider Agents listed in the search results will appear with **Edit** and **Deactivate** buttons.
 - To edit the Agent role(s) assigned to the Medicaid ID, click the **Edit** button.
 - To deactivate the Agent's access to the selected Medicaid ID, click **Deactivate**.

The screenshot shows the 'Provider Account Administration' interface. At the top, there are search filters for 'Medicaid ID' and 'Agent Sub Role'. Below these, the 'Agent ID' is set to '74813221'. To the right of the search filters are buttons for 'Search', 'Add New Agent', 'Reassign Admin', and 'Clear'. Below the search filters, there are two red callout circles labeled '4' and 'C'. Below these, there is a table with the following columns: 'Medicaid ID', 'Provider Name', 'Agent OH ID', 'Agent Name', and 'Agent Roles'. The table contains one row with the following data: 'Medicaid ID' (blank), 'Provider Name' (Dale), 'Agent OH ID' (74813221), 'Agent Name' (Blanch), and 'Agent Roles' (Claim Submission, 1099 Information, EFT Agent, Hospice Enroll Maintenance, MDS Report). To the left of the table, there are buttons for 'Edit' and 'Deactivate'. The 'Edit' button is highlighted with a red box.

Reassign the Administrator role for a Med ID to another Admin or Provisioned Power Agent (with Access Management) using the Reassign Admin Button

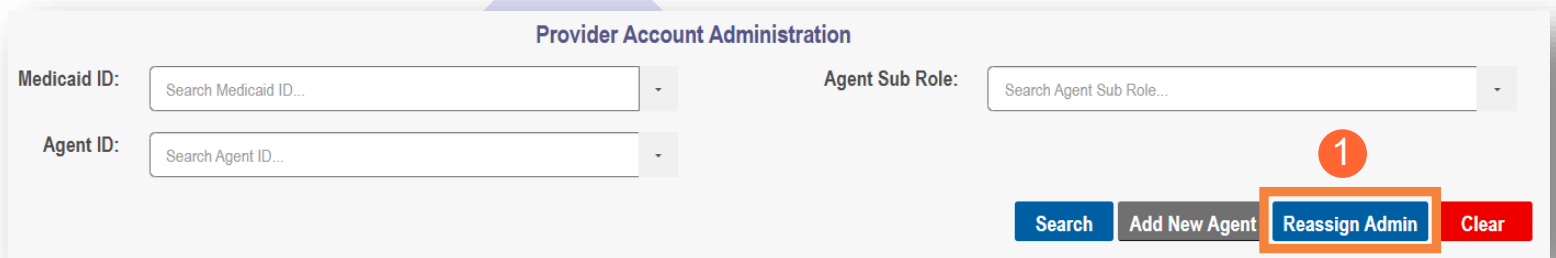
The **Reassign Admin** button allows Provider Administrators and Provisioned Power Agents (with Access Management) to reassign the Provider Administrator role of one Medicaid ID to another Provider Administrator or Provisioned Power Agent (with Access Management). This feature is useful for organizations that need to reassign the Provider Administrator role to another Provider Administrator or Provisioned Power Agent (with Access Management) within their organization.

NOTE: To reassign the Provider Administrator of one Medicaid ID to another Provider Administrator within PNM, click the Reassign Admin button. As a reminder, there is only one Provider Administrator allowed per Medicaid ID.

- Use the **Reassign Admin** button when transferring Provider Administrators and the New Administrator OHID is known.

NOTE: If transferring the Provider Administrator role from someone within your organization to a Provider Administrator outside your organization, and the New Administrator OHID is unknown, then use the [PNM System Administrator Change Request](#) form.

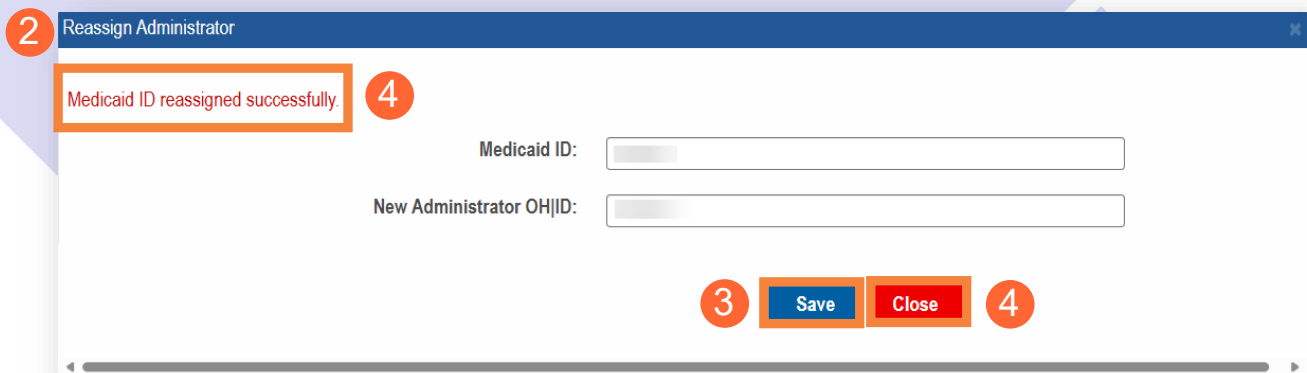
Step 1: Click the **Reassign Admin** button.



The screenshot shows the 'Provider Account Administration' form. It has two search fields: 'Medicaid ID:' and 'Agent ID:', each with a search input and a dropdown arrow. To the right is an 'Agent Sub Role:' field with a search input and a dropdown arrow. At the bottom right, there are four buttons: 'Search' (blue), 'Add New Agent' (grey), 'Reassign Admin' (blue, highlighted with an orange box and a red circle with the number 1), and 'Clear' (red).

Step 2: In the Reassign Administrator pop-up enter:

- The Medicaid ID of the provider that is having the Provider Administrator role changed.
- The New Administrator OHID.



The screenshot shows the 'Reassign Administrator' pop-up window. It has a title bar with the text 'Reassign Administrator' and a close button (X). Inside the window, there is a message 'Medicaid ID reassigned successfully.' in red text, highlighted with an orange box and a red circle with the number 4. Below the message are two input fields: 'Medicaid ID:' and 'New Administrator OHID:'. At the bottom, there are three buttons: 'Save' (blue, highlighted with an orange box and a red circle with the number 3), 'Close' (red, highlighted with an orange box and a red circle with the number 4), and a red circle with the number 4.

Step 3: Click the **Save** button.

Step 4: When you see message **Medicaid ID reassigned successfully** in the top left area of the pop-up click the **Close** button.

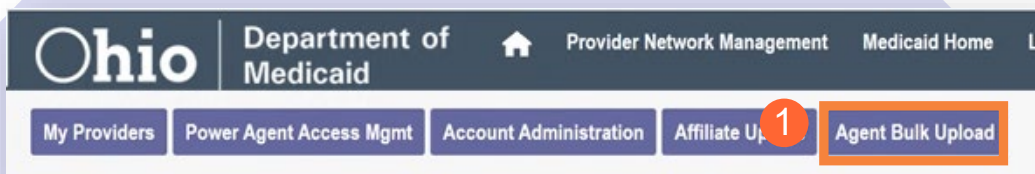
NOTE: The newly assigned Provider Administrator will see the reassigned Medicaid ID on their dashboard, and it will no longer be visible on the original Administrator dashboard.

Bulk Agent Upload

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

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

Step 1: To begin the Bulk Agent upload process, click the **Agent Bulk Upload** button.



- The Bulk Agent Upload screen appears, where you will also see the **Bulk Agent Upload History** section and **Bulk Agent Error Code Reference**.

Department of Medicaid

Provider Network Management Medicaid Home Learning Contact Fee Schedule

Bulk Agent Upload

Field mapping and validations for the template upload are defined in the **Reference** tab in the template.

Agent Bulk Upload Template:

Agent Role List:

Upload File

Bulk Agent Upload History

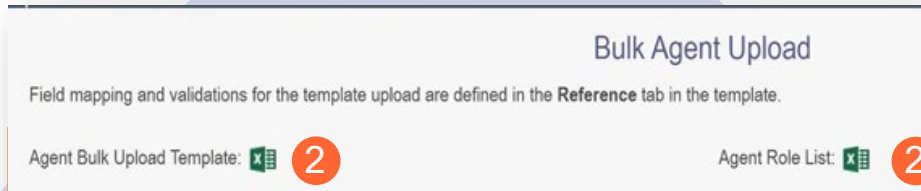
File Upload Date	File Name	File Upload Status	Upload	Response
No Bulk Agent Uploads found				

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.

Step 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.

1	Reference	
2	Column name	Comments
3	Update Type	"A" = Add "D" = Delete
4	Provider Administrator OH ID PROD	No special formatting required
5	Medicaid ID	Must be 7 digits Please include any leading zero(s)
6	Agent OH ID PROD	No special formatting required
7	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
8		
9		
10		
11		

Below the table is a tabbed interface with two tabs: "Bulk Upload" and "Reference". The "Reference" tab is currently selected and highlighted with an orange border.

Step 3: Download the Agent Bulk Upload Template and enter the required information.

Agent Bulk Upload Template: 

3

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

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:

- 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.

1	Update Type	Provider Administrator OHID PROD	Medicaid ID	Agent OH ID PROD	GrantedRole to AGENT
2	D	79711831	006755	79438015	All Roles
3	A	79711831	006755	79438015	Claim Search
4	A	79711831	006755	79438015	Claim Submission
5	A	79711831	006755	79438015	Correspondence
6	A	79711831	006755	79438015	CPC Agent
7	A	79711831	006755	79438015	Deemed Eligibility
8	A	79711831	006755	79438015	Eligibility

Step 4: 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.

Agent Role List:  4

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29
			Role Name																									
			Hospital Contact																									
			Hosp Cost Report Upload																									
			Hospice Enroll Search																									
			Hospice Enroll Maintenance																									
			Prior Authorization Submit																									
			Prior Authorization Search																									
			Eligibility																									
			Claim Search																									
			Claim Submission																									
			1099 Information																									
			View Remittance Advices																									
			Deemed Eligibility																									
			Sign Approve LTC Cost Report																									
			Prepare Save LTC Cost Report																									
			View LTC Cost Report																									
			View Provider Reports																									
			Prepare Save MSP Cost Reports																									
			Sign Certify MSP Cost Reports																									
			View MSP Cost Reports																									
			View MSP Cost Report Due Date																									
			Prenatal Visit																									
			View SURS																									
			Group Agent																									
			Provider Alternative Payment Model Agent																									
			Retrieve Reports																									
			APM Agent																									
			Correspondence																									
			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** 4

Step 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

5 Upload file Cancel

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

Bulk Agent Upload History				
File Upload Date	File Name	File Upload Status	Upload 6	Response 7
09/13/2025	Bulk_Upload_Agent_Template_Test1_2.xlsx	Complete	View Upload	View Response

Bulk Agent Error Code Reference 8		
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

Step 6: Click **View Upload** to view the uploaded file.

Step 7: Click **View Response** to view the result of the submissions

- View Bulk Agent Upload **Error Code OR Accepted**

NOTE: Responses can take up to 15 minutes to be available once the upload has been submitted.

Step 8: 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 (see step 5). Afterward, click the View Response button to determine whether the correction is Accepted. If the correction has been Accepted, then the Agent has been provisioned.

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.

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
<u>GrantedRole</u> 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

Global Administrator Change

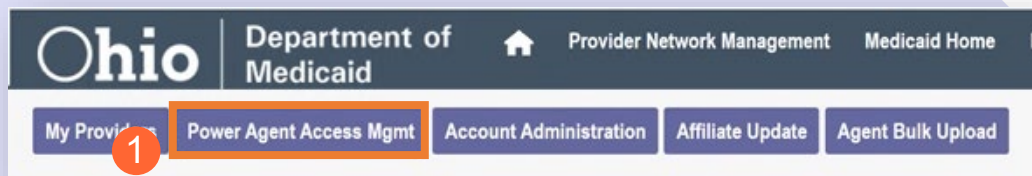
A Global Administrator Change process is now available when the Provider Administrator leaves and needs ALL the Medicaid IDs on their dashboard to be reassigned to another PNM user. Power Agents (with Access Management) can globally transfer the Administrator's entire portfolio to another Provider Administrator or Power Agent. After completing the process, the new Global Administrator is then assigned to all the Medicaid IDs and associated Provider Agent and Power Agent accounts.

- As a reminder, there is only one Provider Administrator allowed per Medicaid ID.

Global Administrator Change Process

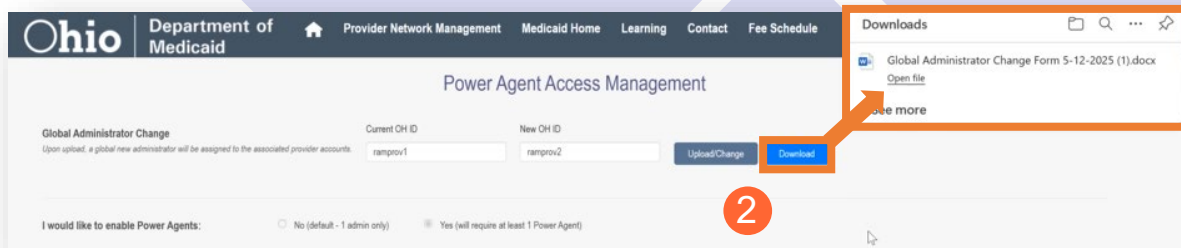
Step 1:

Click the **Power Agent Access Mgmt** button from the dashboard.



Step 2:

Under the Global Administrator Change section, click the Download button to access the Global Administrator Change Form and download it to your computer. This form can be completed digitally or printed and completed manually before uploading it to PNM.



Step 3:

Open and complete the required fields of the PNM Global Administrator Change Form.

NOTE: Read this form very carefully. The form may be completed manually or digitally, including the Authorizing Signature required to process the form.

Ohio Department of Medicaid
PROVIDER NETWORK MANAGEMENT (PNM)
GLOBAL ADMINISTRATOR CHANGE FORM

The purpose of this form is to document when the current provider administrator's portfolio (all providers listed on their dashboard) needs to be changed to another administrator within the same organization. This change is a global administrator change. The transfer of provider administrator rights to a new administrator within the organization may be temporary (e.g., a few months to cover a leave of absence) or permanent (e.g., the current administrator transitions to a new role or leaves the organization). Temporary changes require the submission of a new Global Administrator Change Form to restore the original provider administrator. The global administrator change will transfer provider administrator rights for all providers listed on the current administrator's dashboard in PNM to the new administrator. Each Medicaid ID will continue to only have one active Administrator at a time.

Please complete the information listed below and sign the form. Upload the completed, signed form to PNM when prompted during the global administrator change process.

THIS REASON FOR THE GLOBAL ADMINISTRATOR CHANGE IS:
(Indicate the reason for the global administrator change here)

	CURRENT PROVIDER ADMINISTRATOR	REPLACEMENT/NEW PROVIDER ADMINISTRATOR
NAME		
OH ID		
EMAIL		
EFFECTIVE DATE		

3 Authorizing Signature: _____ Date: _____
Printed Name of Authorizing Signature: _____

For instructions on completing the Global Administrator Change process, navigate to the Provider Education & Training Resources page in PNM located at https://ohpnm.omes.maximus.com/OH_PNM_PROD/Resources.aspx and click on the

Step 4: Select the OHID of the current Provider Administrator under the **Current OHID** dropdown.

Power Agent Access Management

Global Administrator Change
Upon upload, a global new administrator will be assigned to the associated provider accounts.

4 Current OH ID
Select OHID
Select OHID
ramprov2

New OH ID

Step 5: Enter the OHID of the new Provider Administrator in the **New OHID** box.

The screenshot shows the 'Power Agent Access Management' page. At the top is the 'Ohio Department of Medicaid' header with navigation links: 'Provider Network Management', 'Medicaid Home', 'Learning', 'Contact', and 'Fee Schedule'. Below the header, the page title is 'Power Agent Access Management'. The main section is titled 'Global Administrator Change' with a sub-note: 'Upon upload, a global new administrator will be assigned to the associated provider accounts.' There are two input fields: 'Current OH ID' with the value 'ramprov1' and 'New OH ID' with the value 'ramprov2'. The 'New OH ID' field is highlighted with a red circle and the number 5. To the right of these fields are two buttons: 'Upload/Change' and 'Download'.

Step 6: Once the Global Administrator Change Form is completed, please click the **Choose File** button to upload the file from your computer.

File types supported:

- .doc
- .docx
- .pdf
- .jpeg
- .jpg
- .png
- .tiff

The screenshot shows a dialog box titled 'Upload Global Administrator Change Form'. It contains the text: 'Please select the completed Global Administrator Change Form to upload.' Below this text is a file selection bar with a 'Choose File' button and the text 'Doc1.docx'. Below the file selection bar, it says 'Selected: Doc1.docx (404.40 KB)'. At the bottom right of the dialog box, there are two buttons: 'Save' and 'Cancel'. The 'Save' button is highlighted with a red circle and the number 7.

Step 7: Once you see the correct file in the upload bar, click **Save**.

NOTE: The uploaded form is solely for documentation purposes on behalf of the organization.

How do I know when to complete the Reassign Administrator button, the Change Administrator Form, or the Global Administrator Change process?

- **Reassign Administrator Button** – This button is available to Provider Administrators and Provisioned Power Agents (with Access Management) and is used to reassign the Provider Administrator role of one Medicaid ID to another Provider Administrator or Provisioned Power Agent (with Access Management) within PNM, and the new Administrator OHID is known.
- This feature is useful for organizations that need to reassign the Provider Administrator role to another Provider Administrator or Provisioned Power Agent (with Access Management) within their organization.
- As a reminder, there is only one Provider Administrator allowed per Medicaid ID.
- **Change Administrator Request Form** – This form is used when transferring the Provider Administrator role of a Medicaid ID from someone within your organization to a Provider Administrator outside your organization, and the New Administrator OHID is unknown.
- As a reminder, there is only one Provider Administrator allowed per Medicaid ID.
- **Global Administrator Change Process** – This process is used when the Provider Administrator leaves and needs ALL the Medicaid IDs on their dashboard to be reassigned to another PNM user.
- If the Admin has enabled Power Agents (with Access Management), then a Power Agent can complete the reassignment of all the Medicaid ID's from the Admins dashboard to another Admin or a Power Agent (with Access Management) through the Global Administrator Change process.
- As a reminder, there is only one Provider Administrator allowed per Medicaid ID.

Power Agent and Administrator Resources: PNM Learning Page

- [PNM Learning Page](#)
- [QRG: PNM Enhancements and Power Agent Role](#)
- [QRG: Bulk Agent Upload](#)
- [QRG: Power Agent Assignment & Actions](#)
- [QRG: Global Administrator Change Process](#)
- QRG: Agent Assignment & Actions