Quick Reference Guide: Group/Organization/Agency Affiliations in PNM

Please read

Important information regarding Group/Organization/Agency Affiliations in the PNM System:

1. Affiliations to a group/organization/agency can be made through either the individual practitioner's application/record (Page 2) or through the group/organization/agency's application/record (Page 7).

    1. An individual will need to have the Medicaid ID of the group/organization/agency to request affiliation to that entity. Entering that information DOES NOT automatically affiliate the practitioner to the group/organization/agency.

    2. The group/organization/agency needs to have the individual practitioner's first name, last name, NPI, and choose a rendering location for the provider to affiliate them under the group.

2. Affiliations made through the individual practitioner's application will remain in 'pending approval' status until the group/organization/agency confirms the affiliation of the individual practitioner (Page 4).

    a. This must be completed by the group/organization/agency completing an update in PNM (under the group's Medicaid ID) and accessing the Group, Organization & Hospital Affiliations page.

    b. The Administrator of the group/organization/agency's Medicaid ID (or an Agent with the Enrollment Agent action) can initiate and complete an update in PNM.

3. A Welcome Letter does not include whether a provider is affiliated with a group/organization/agency. The Welcome Letter indicates that a provider is enrolled in Ohio Medicaid.

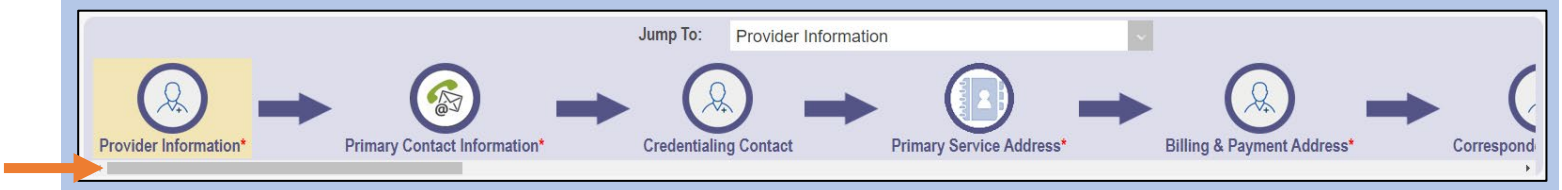
    a. A Welcome Letter is sent to an individual practitioner even though the group/organization/agency has not confirmed that practitioner's affiliation with them.

4. To remove a practitioner as an affiliate, an update must be completed under the group/organization/agency's Medicaid ID by entering an End Date (Page 10).

Quick Reference Guide: Group/Organization/Agency Affiliations in PNM

Steps: Entering an Affiliation in PNM as a new Individual Practitioner

1

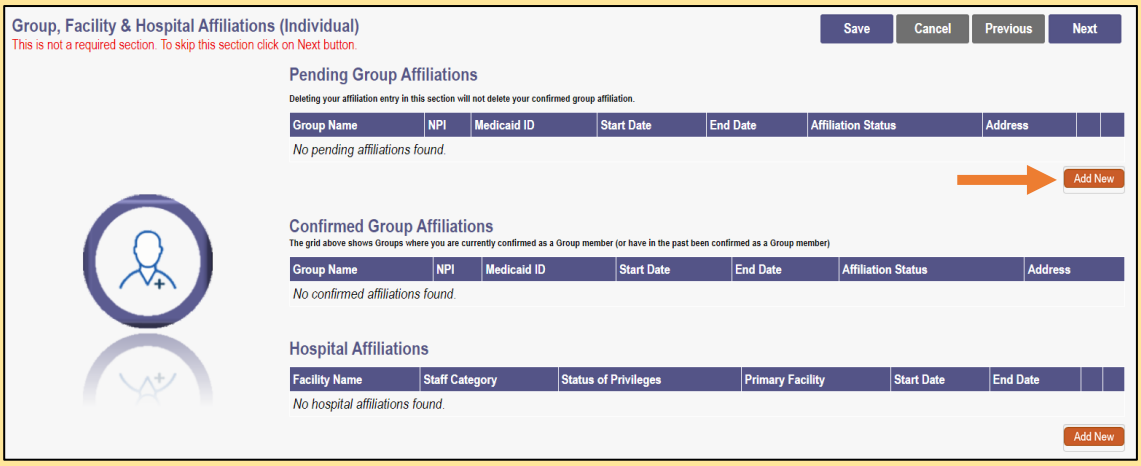


When completing a new enrollment application for an individual practitioner, go through each page listed in the navigation bar to enter information for the provider.

2

The Group, Facility & Hospital Affiliations (Individual) page is where an affiliation that an individual practitioner has with a group/organization/agency is indicated.

3



Click **Add New** under 'Pending Group Affiliations' to add the group/organization/agency.

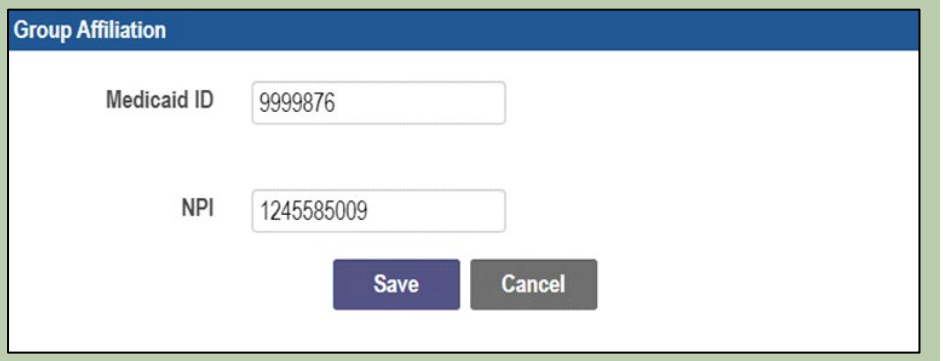
Disclaimer: It is the Provider's responsibility to keep information up to date in PNM. This includes specialties, contact information, addresses, etc.

Quick Reference Guide: Group/Organization/Agency Affiliations in PNM

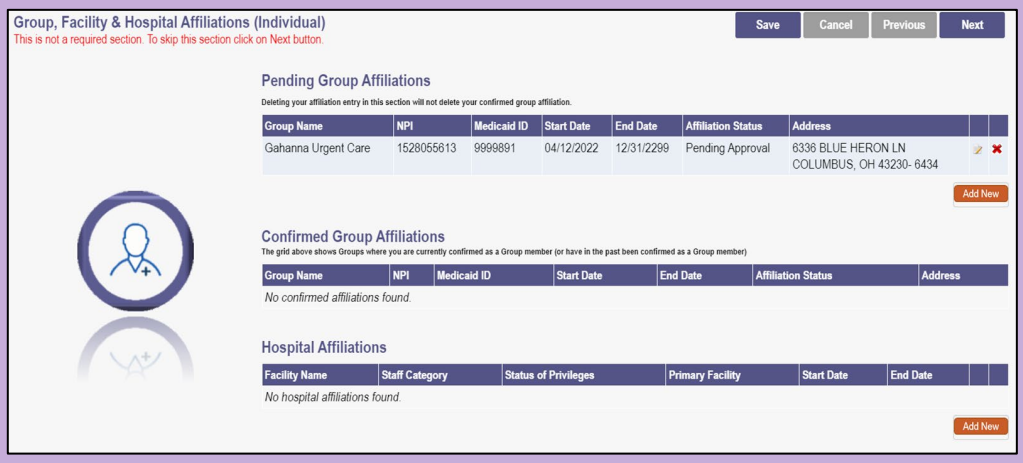
Steps:

4

- Enter the Medicaid ID for the group/organization/agency that the individual practitioner is requesting affiliation with.
- Press Tab on the keyboard or click outside of the Medicaid ID box and the NPI number of the group/organization/agency will auto-fill.
- Click **Save.**



5

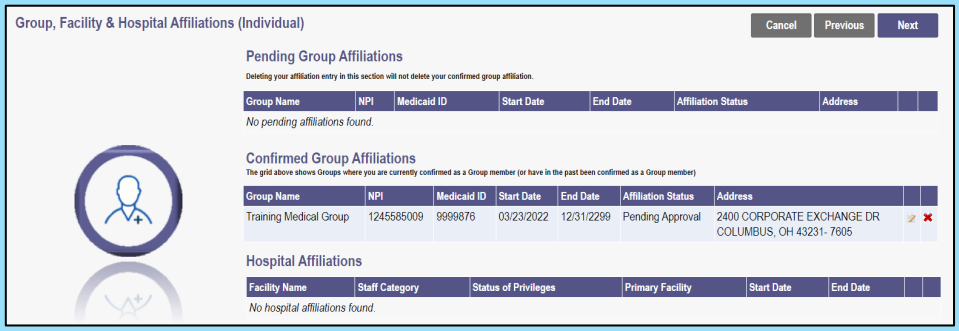


- The affiliation saved is listed under 'Pending Group Affiliations' and will remain there until a user from the group confirms the affiliation by accessing the group/organization/agency's record.
- The Affiliation Status will display as 'Pending Approval' until this confirmation from the group (not ODM) occurs.
- Repeat the process of 'add new' to add any other affiliations for the individual practitioner.

6

Once the group/organization/agency confirms the individual practitioner's request to affiliate, the affiliation will display under 'Confirmed Group Affiliations.'

Note: A Welcome Letter will be sent out to an individual practitioner once they are successfully enrolled in Medicaid. A 'pending' or 'confirmed' group affiliation does not impact the letter being sent to the practitioner.



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Quick Reference Guide: Group/Organization/Agency Affiliations in PNM

Steps: Confirming an Individual Practitioner's Affiliation as Group

1

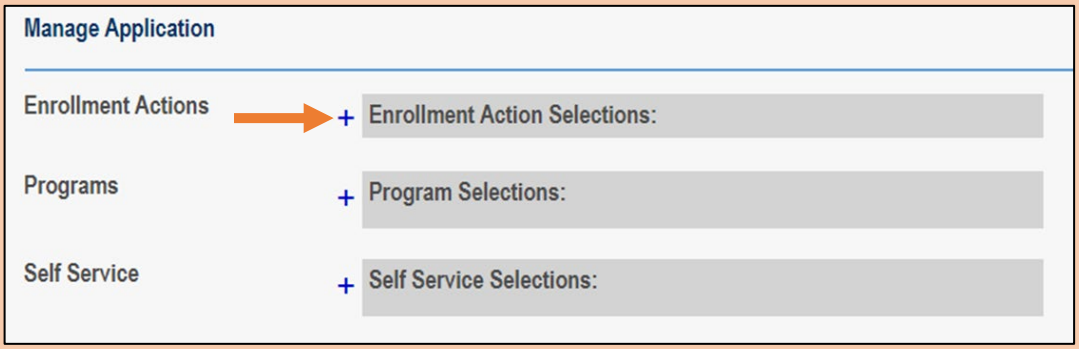
An affiliation to a group/organization/agency entered by an individual practitioner must be confirmed in PNM by a member of the group/organization/agency. Otherwise, the affiliation will remain in a 'pending' status.

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						
517946	Training Group	Complete	21 - Professional Medical Group	1245585009	9999876	Professional Medical Group				02/09/22	12/16/22	02/09/27

The affiliation confirmation is completed by initiating and finalizing an update to the group/organization/agency's record. Locate the group/organization/agency's record on your dashboard and click on the Reg ID.

This process can be completed by the Administrator for the group/organization/agency's Medicaid ID or a user with the Agent role, if that Agent has been assigned the 'Enrollment Agent' action by the Administrator.

2

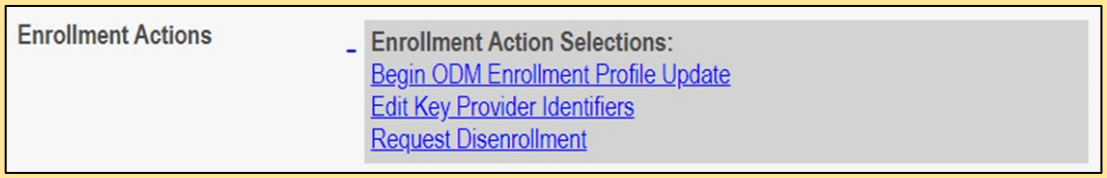


On the Provider Management Home page, locate the section in the middle titled 'Managed Application.'

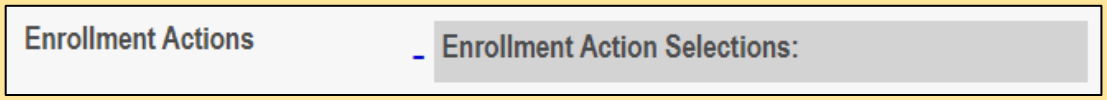
Under that section, click the '+' icon to expand the Enrollment Action Selections.

3

Click on the hyperlink which says "Begin ODM Enrollment Profile Update."



Note: If an application/record is in an active workflow (review for an initial submission or update) there will be no links appearing under Enrollment Actions due to changes not being allowed while a review is in process.



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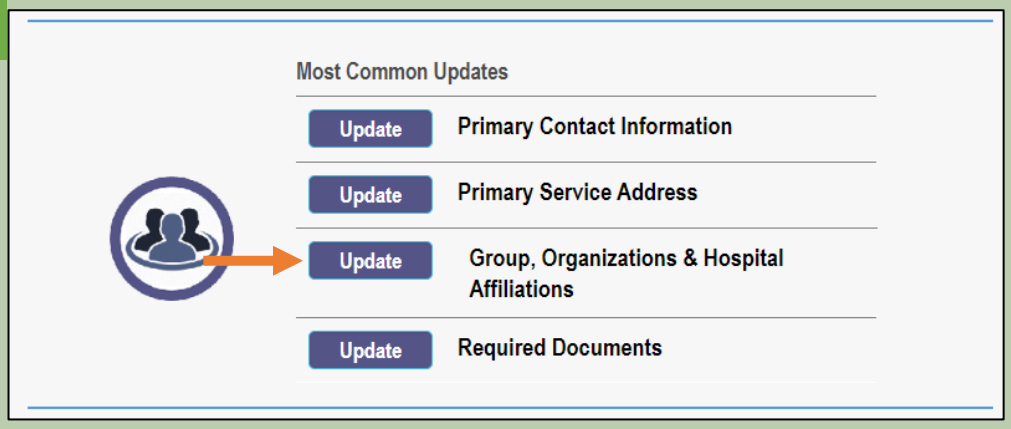
Quick Reference Guide: Group/Organization/Agency Affiliations in PNM

Steps:

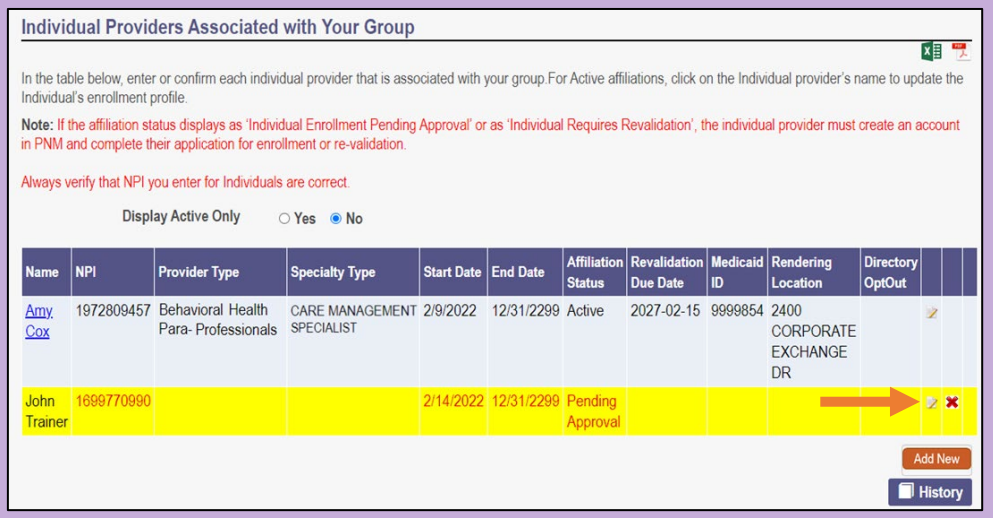
4



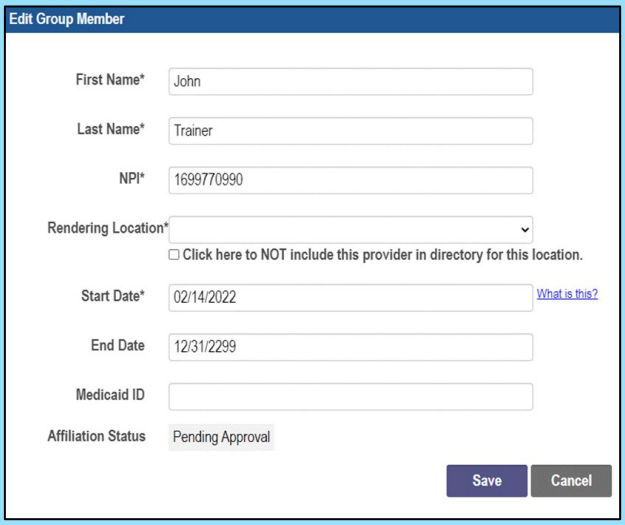
To update the affiliation information for the group/organization/agency, click **Update** next to "Group, Organization & Hospital Affiliations" which appears on the update list

5

- All individual affiliations for the group/organization/agency (regardless of status) appear in the table. *If needed, sort through the page numbers listed to locate practitioners.*
- Any individual practitioners who are 'pending approval' will be highlighted in yellow
- To confirm an affiliation, click on the 'pencil and paper' icon for the practitioner who is 'Pending Approval.'



6



- The individual practitioner's information appears in a pop-up window, including First Name, Last Name, and NPI.
- Select a 'Rending Location' for the practitioner from the drop-down. *The options listed in the drop-down are the primary service location or any other service locations listed for the group/organization/agency.*
- Update the Start Date for the provider, if needed. *(this cannot be prior to the provider's effective date with Ohio Medicaid)*
- Click **Save**.

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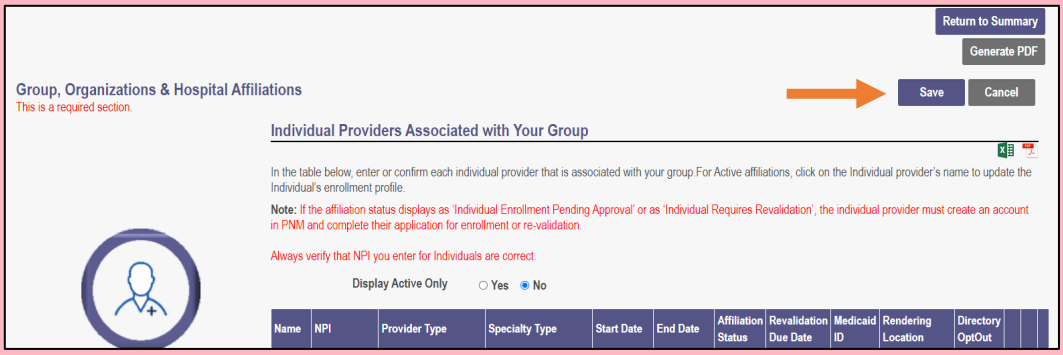
Quick Reference Guide: Group/Organization/Agency Affiliations in PNM

Steps:

7

- The newly affiliated provider appears on the table without the yellow highlight.
- The Affiliation Status shows 'Confirmed' meaning you have confirmed the individual practitioner is an affiliate of the group/organization/agency.
- If there are more practitioners to confirm, repeat Steps 5-7.

8



When all 'pending' affiliations have been confirmed, click the **Save** button at the top of the page, to save the changes made to the Group, Organization & Hospital Affiliations page.

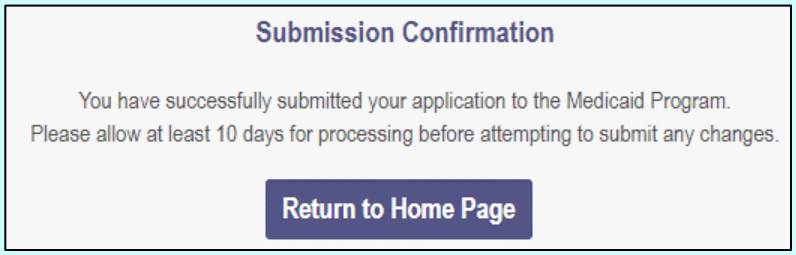
9

To complete the update process (and the changes to the affiliations) click **Submit for Review.**

Updates to affiliations go through an automated review process. This review process is necessary for the affiliate's status to be updated to 'Active.'

A submission confirmation message displays indicated that the update has been submitted.

Click **Return to Home Page**, to go to your dashboard



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Quick Reference Guide: Group/Organization/Agency Affiliations in PNM

Steps: Adding a new Individual Practitioner Affiliation as Group

1

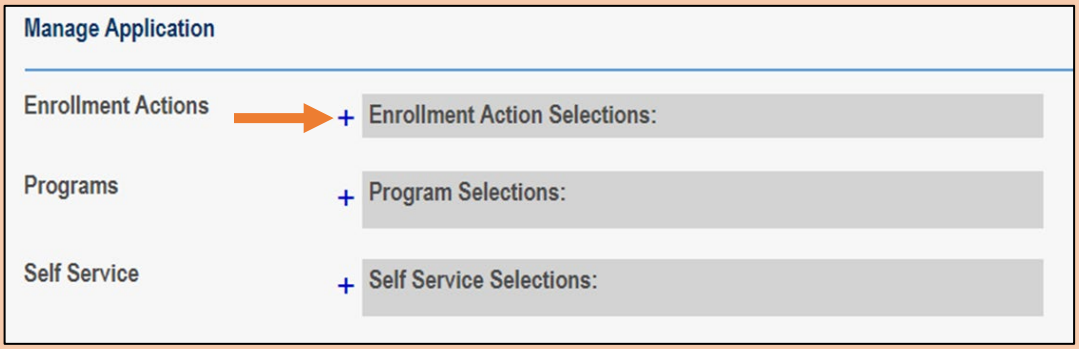
A member of the group/organization/agency can add new individual practitioners as affiliates under the group's record. To do this, the provider must be enrolled in Ohio Medicaid and have an NPI number showing in the PNM system. *This is the recommended best practice*

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						
517946	Training Group	Complete	21 - Professional Medical Group	1245585009	9999876	Professional Medical Group				02/09/22	12/16/22	02/09/27

The addition of an individual practitioner to a group is completed by initiating and finalizing an update to the group/organization/agency's record. Locate the group/organization/agency's record on your dashboard and click on the Reg ID.

This process can be completed by the Administrator for the group/organization/agency's Medicaid ID or a user with the Agent role, if that Agent has been assigned the 'Enrollment Agent' action by the Administrator.

2

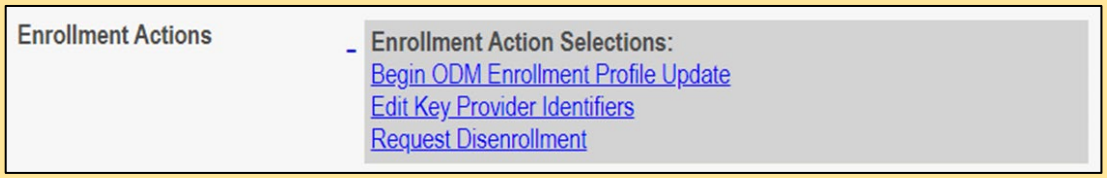


On the Provider Management Home page, locate the section in the middle titled 'Managed Application.'

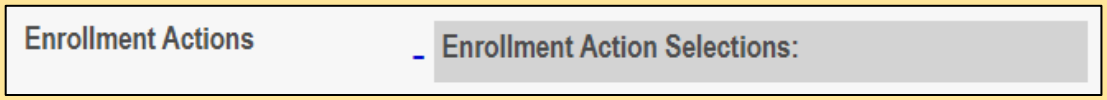
Under that section, click the '+' icon to expand the Enrollment Action Selections.

3

Click on the hyperlink which says "Begin ODM Enrollment Profile Update."



Note: If an application/record is in an active workflow (review for an initial submission or update) there will be no links appearing under Enrollment Actions due to changes not being allowed while a review is in process.



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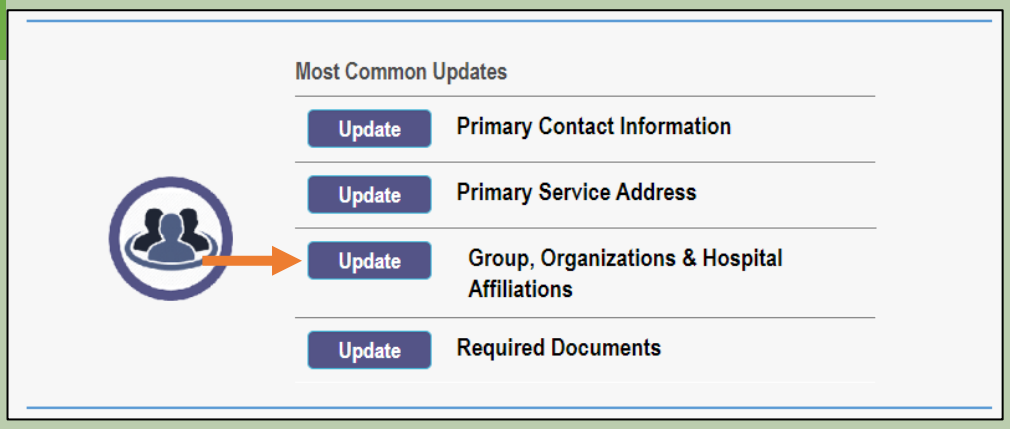
Quick Reference Guide: Group/Organization/Agency Affiliations in PNM

Steps:

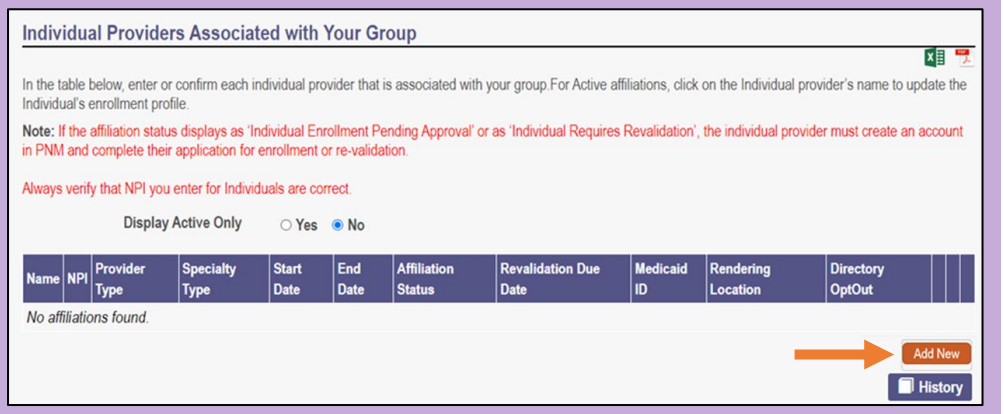
4



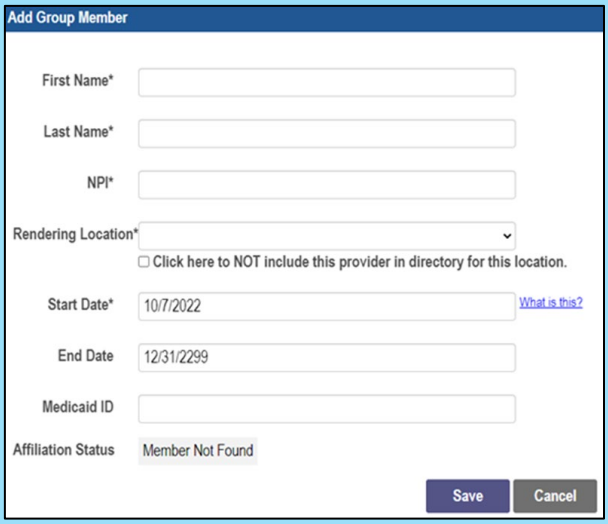
To update the affiliation information for the group/organization/agency, click **Update** next to "Group, Organization & Hospital Affiliations" which appears on the update list.

5

- All individual affiliations for the group/organization/agency (regardless of status) appear in the table. *If there are no affiliations for this group, PNM displays a "No affiliations found" message.*
- To add a new individual practitioner as an affiliate to the group/organization/agency, click **Add New**.



6



- A pop-up window displays asking you to enter the practitioner's First Name, Last Name, and NPI.
- Select a 'Rending Location' for the practitioner from the drop-down. *The options listed in the drop-down are the primary service location or any other service locations listed for the group/organization/agency.*
- Enter the Start Date for the provider. *(this cannot be prior to the provider's effective date with Ohio Medicaid)*
- Click **Save**.

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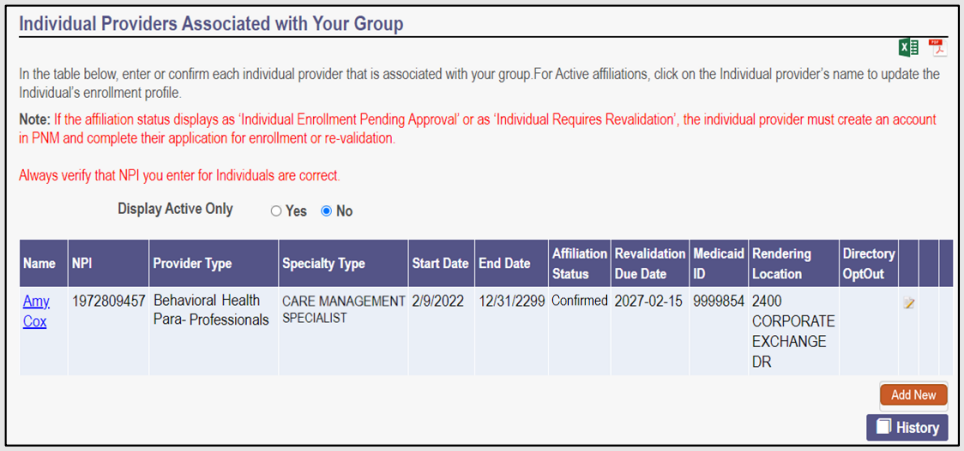
Quick Reference Guide: Group/Organization/Agency Affiliations in PNM

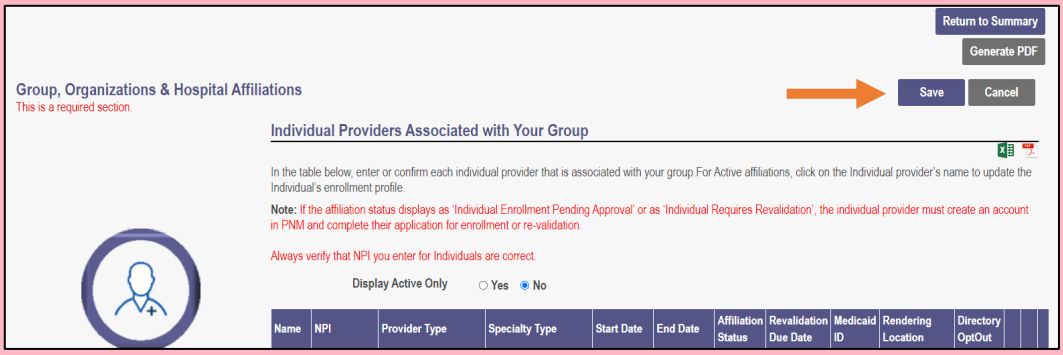
Steps:

7

- The newly affiliated practitioner appears on the table.
- The Affiliation Status shows 'Confirmed' meaning you have confirmed the individual practitioner is an affiliate of the group/ organization/agency.
- If there are more locations to list for the added individual or more practitioners to add, repeat Steps 5-7.



8



When all practitioners have been added, click the **Save** button at the top of the page, to save the changes made to the Group, Organization & Hospital Affiliations page.

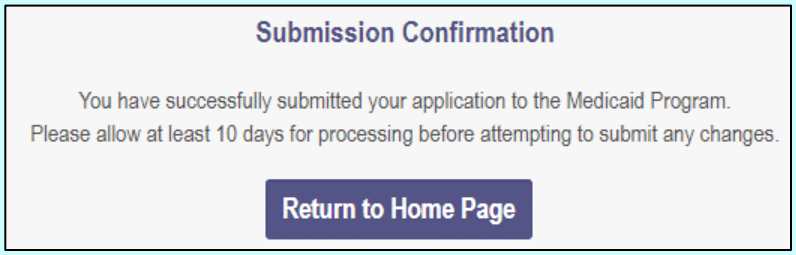
9

To complete the update process (and the changes to the affiliations) click **Submit for Review.**

Updates to affiliations go through an automated review process. This review process is necessary for the affiliate's status to be updated to 'Active.'

A submission confirmation message displays indicated that the update has been submitted.

Click **Return to Home Page**, to go to your dashboard.



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Quick Reference Guide: Group/Organization/Agency Affiliations in PNM

Steps: Removing an Individual Practitioner Affiliation as Group

1

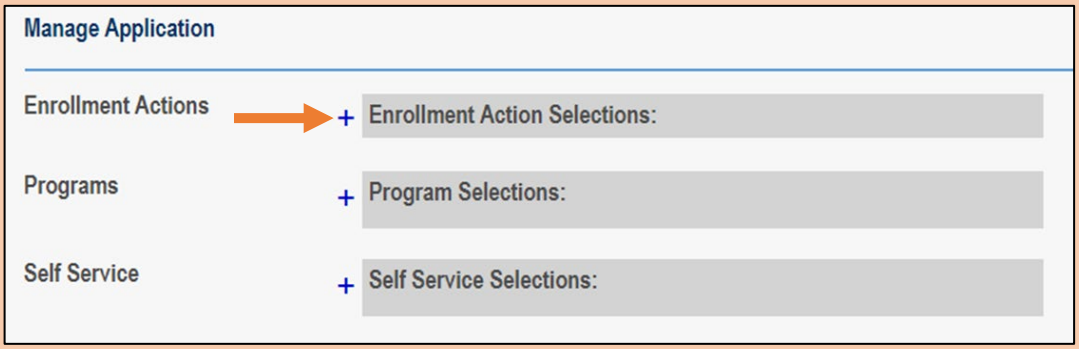
A member of the group/organization/agency can end an individual practitioner's affiliation under the group's record.

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						
517946	Training Group	Complete	21 - Professional Medical Group	1245585009	9999876	Professional Medical Group				02/09/22	12/16/22	02/09/27

The removal of an individual practitioner from a group is completed by initiating and finalizing an update to the group/organization/agency's record. Locate the group/organization/agency's record on your dashboard and click on the Reg ID.

This process can be completed by the Administrator for the group/organization/agency's Medicaid ID or a user with the Agent role, if that Agent has been assigned the 'Enrollment Agent' action by the Administrator.

2

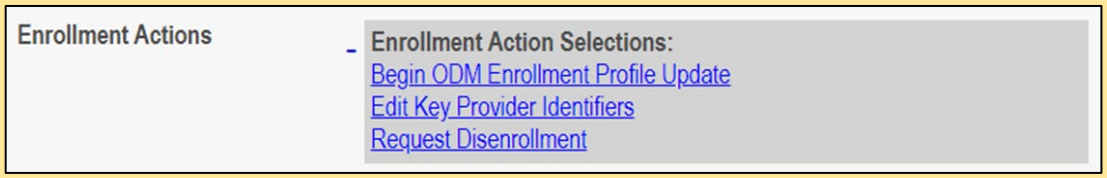


On the Provider Management Home page, locate the section in the middle titled 'Managed Application.'

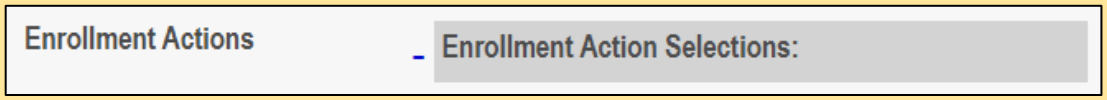
Under that section, click the '+' icon to expand the Enrollment Action Selections.

3

Click on the hyperlink which says "Begin ODM Enrollment Profile Update."



Note: If an application/record is in an active workflow (review for an initial submission or update) there will be no links appearing under Enrollment Actions due to changes not being allowed while a review is in process.



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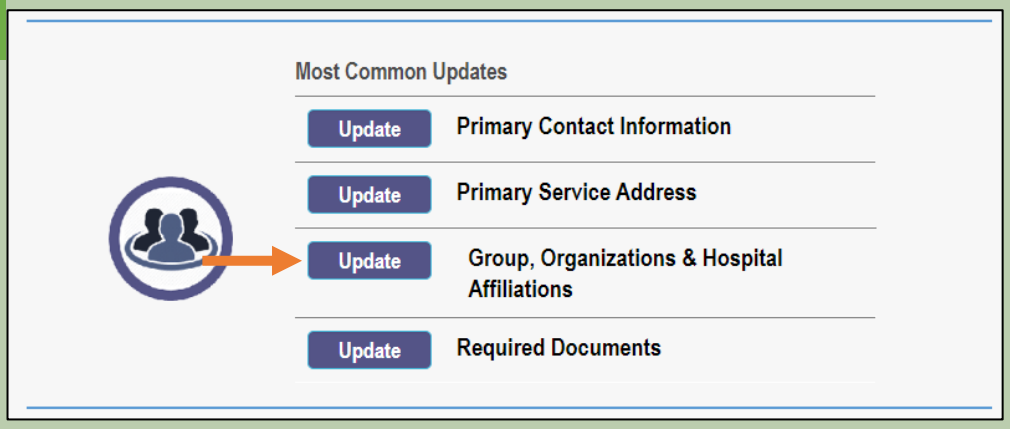
Quick Reference Guide: Group/Organization/Agency Affiliations in PNM

Steps:

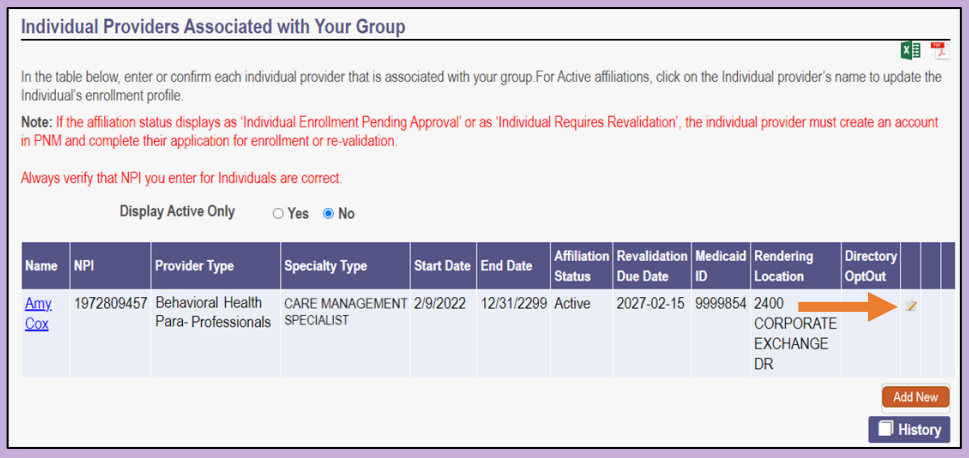
4



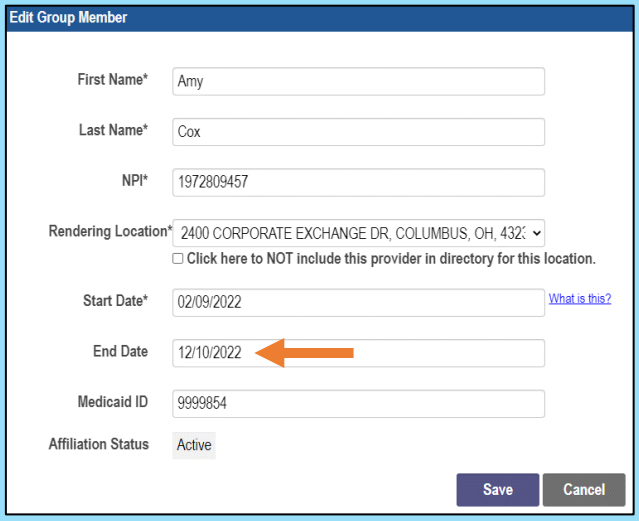
To update the affiliation information for the group/organization/agency, click **Update** next to "Group, Organization & Hospital Affiliations" which appears on the update list.

5

- All individual affiliations for the group/organization/agency (regardless of status) appear in the table.
- Locate the individual practitioner that is no longer affiliated with the group and click the 'pencil and paper' icon to edit information.



6



- A pop-up window displays showing the details of the individual practitioner.
- Edit the End Date to change it from an infinite date (12/31/2299) to the date that the affiliation ended with the individual practitioner. *(If this date is in the future, the practitioner's affiliation will not be removed until that date).*
- Click **Save**.

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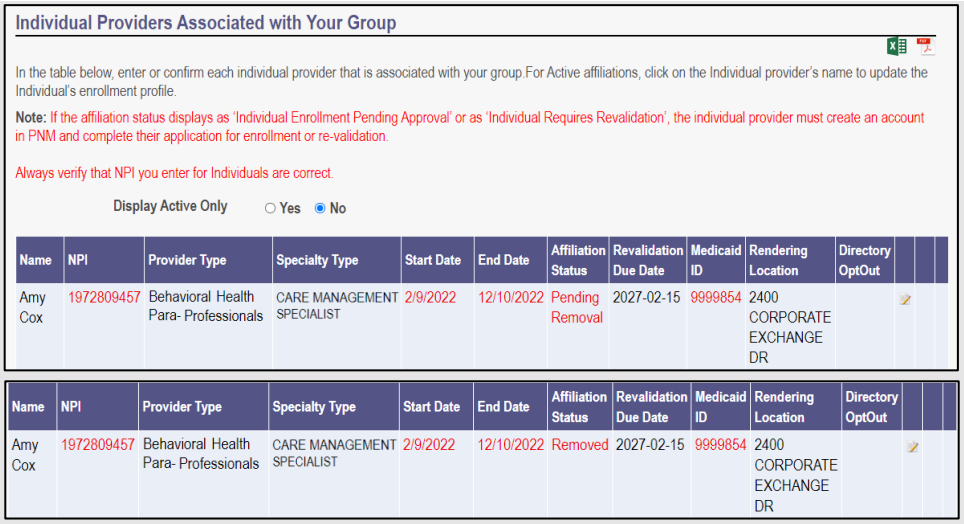
Quick Reference Guide: Group/Organization/Agency Affiliations in PNM

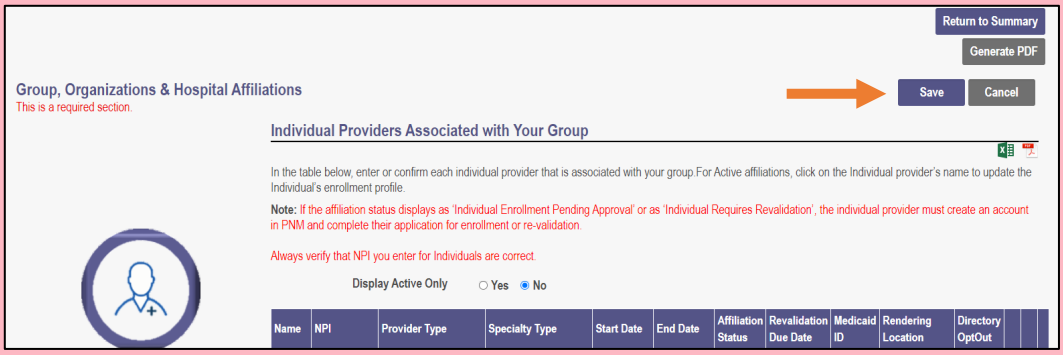
Steps:

7

- The removed practitioner appears on the table with a status of 'Pending Removal.'
- The 'Pending Removal' status will update to 'Removed' after the update is fully processed *(or after the end date is reached, if it is a future date).*
- If there are more practitioners to remove, repeat Steps 5-7.



8



When all practitioners have been removed, click the **Save** button at the top of the page, to save the changes made to the Group, Organization & Hospital Affiliations page.

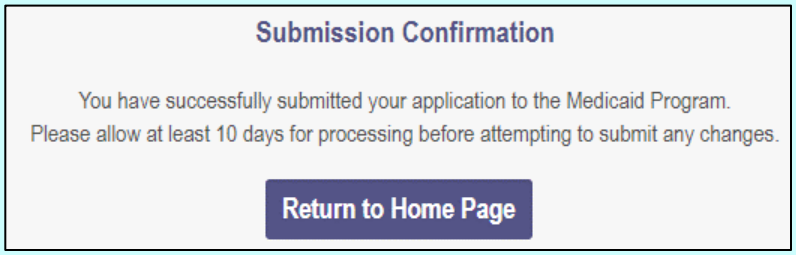
9

To complete the update process (and the changes to the affiliations) click **Submit for Review.**

Updates to affiliations go through an automated review process.

A submission confirmation message displays indicated that the update has been submitted.

Click **Return to Home Page**, to go to your dashboard.



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