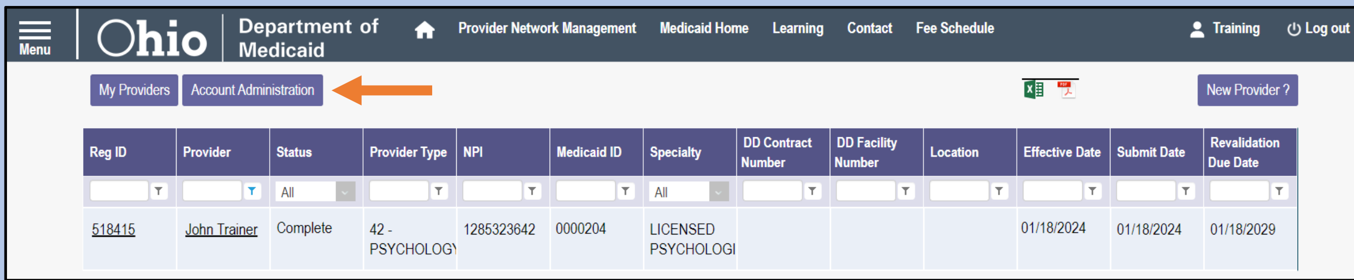
# Quick Reference Guide: Agent Assignment and Actions

## Steps:

### 1




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

To begin this process, if you have an Administrator role, click the **Account Administration** button on your homepage/dashboard.

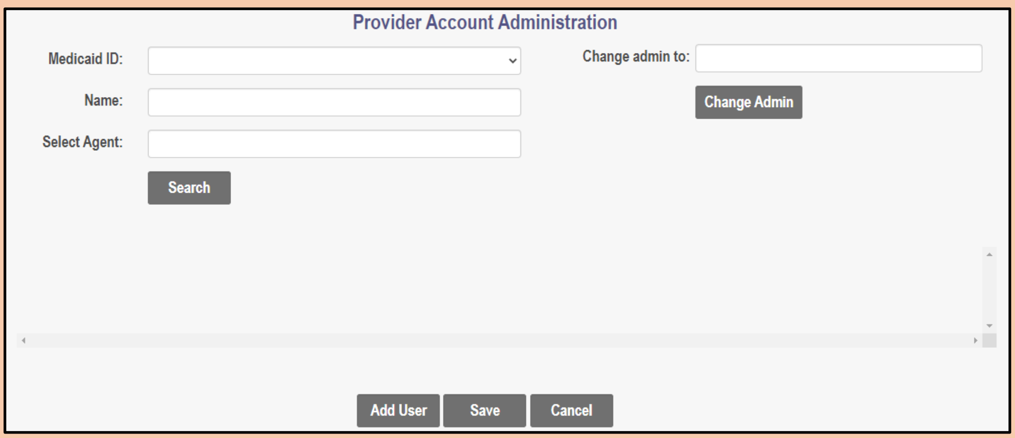
*(Note: The Account Administration button will not appear for users with an Agent role in PNM.)*

### 2

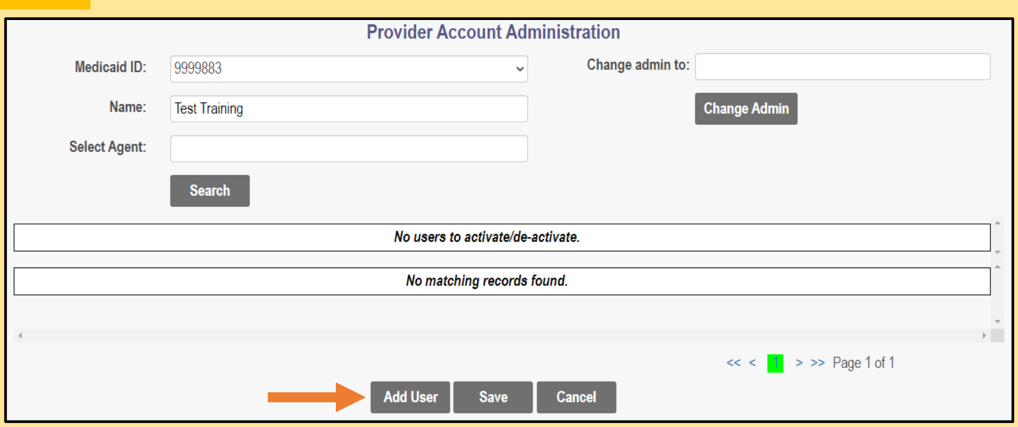
From the drop-down menu, select the **Medicaid ID** of the provider for which you want the Agent to complete actions.

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

Click **Search** to view the provider's agent details.




### 3




To add a new user with an Agent role, click the **Add User** button at the bottom of the page.

*Note: If no users are assigned to a Medicaid ID, the "No users…" and "No matching records…" messages display.*

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

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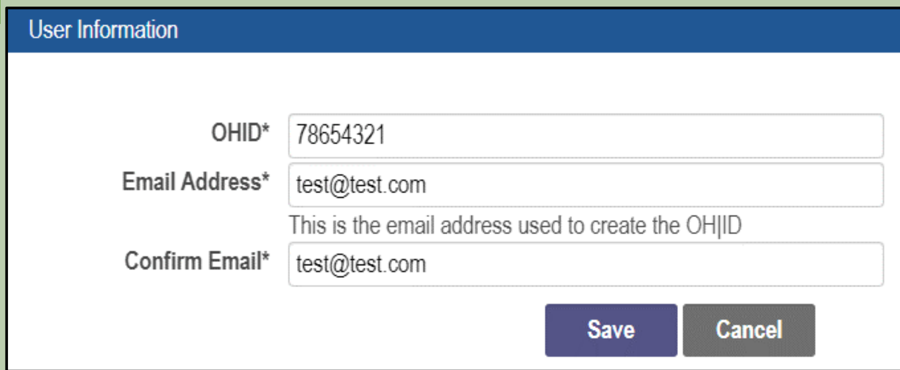
## Steps:

### 4




Enter the OH|ID user ID *(typically an 8-digit number beginning with a '7)* and the email address *(address linked with OH|ID account)* for the Agent you wish to assign actions to.

Click **Save** once details are entered.

*Note: The Agent user must sign into PNM using their OH|ID credentials and select the role of 'Provider Agent' before they can be assigned by an Administrator.*

### 5

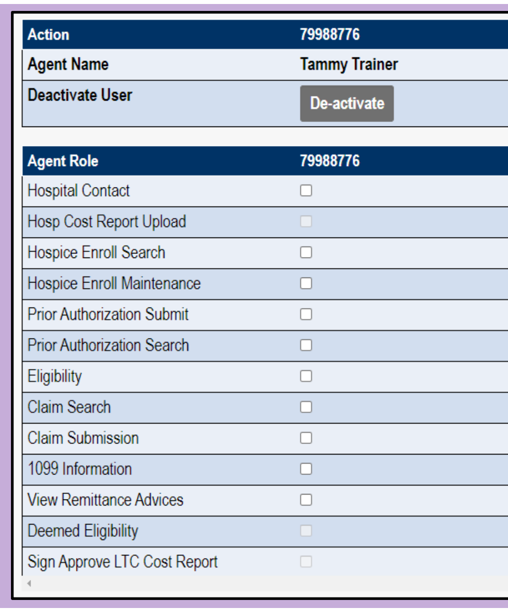
Select the check box for each action that you want the Agent user to have for that Medicaid ID *(multiple boxes can be selected).*

**A full list of available actions is listed on Pages 3 & 4 of this document.*

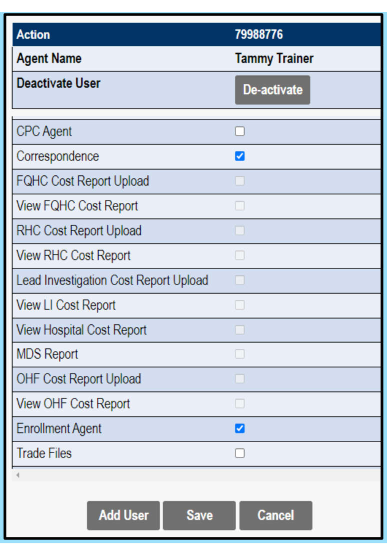
*Note: The Agent's Name appears below their OH|ID User ID in the 'Action' Section.*

When all actions have been assigned, click **Save** at the bottom of the page *(displayed on Step 6)*.

*The Agent will now have this provider (Medicaid ID) appear on their homepage/dashboard in PNM.*




### 6




The next time this provider (Medicaid ID) is accessed through the Account Administration screen, all Agents assigned to the provider will display. If several Agents are assigned, you can use the 'Search' feature and 'Select Agent' field, to locate the specific Agent.

To add new actions, click the check box for each action and click **Save**.

To remove actions, unclick the check box for each action and click **Save**.

To de-activate the Agent from accessing the provider (Medicaid ID), click **De-activate**.

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# Agent Roles/Actions:

| Role Name | Description |
|---|---|
| **1099 Information** | Agent role with the ability to update 1099 Information |
| **Claim Search** | Agent role with the ability to search for claims information |
| **Claim Submission** | Agent role with the ability to submit claims |
| **Correspondence** | Allows agents the ability to access and read correspondence/communications in PNM sent to the provider |
| **CPC Agent** | Allows agents access to update and submit CPC Applications |
| **Deemed Eligibility** | Agent role needed for access to Ohio Benefit's Eligibility Portal |
| **Eligibility** | Agent role with the ability to search for recipient eligibility |
| **Enrollment Agent** ***(must be selected for an Agent to have the 'View Provider File' link under Self Service)*** | Agent role with the ability to update provider information and submit revalidations on behalf of the provider |
| **FQHC Cost Report Upload** | Agent role with the ability to upload FQHC Cost Reports |
| **Group Agent** | Allows agents access to CPC Group Member, Group, Group Affiliation, Group Member, Group Members |
| **Hospice Enroll Maintenance** | Agent role with the ability to maintain Hospice enrollments |
| **Hospice Enroll Search** | Agent role with the ability to search Hospice enrollments |
| **Hospital Contact** | Agent role with the ability to update Hospital Addresses on behalf of the provider |
| **Hospital Cost Report Upload** | Agent role with the ability to upload Hospital Cost Reports |
| **Lead Investigation Cost Report Upload** | Agent role with the ability to upload LI Cost Reports |
| **MDS Report** | Agent role with the ability to download MDS Reports. This individual must be an employee of the provider |
| **OHF Cost Report Upload** | Agent role with the ability to upload OHF Cost Reports |
| **Prenatal Visit** | Agent role needed to authenticate with Duet's Nurture Ohio System |
| **Prepare Save LTC Cost Report** | Agent role with the ability to prepare LTC Cost Reports and Trade Files |
| **Prepare Save MSP Cost Reports** | Agent role with the ability to approve MSP Cost Reports |

# Quick Reference Guide: Agent Assignment and Actions

## Agent Roles/Actions:

| Role Name | Description |
|---|---|
| Prior Authorization Search | Agent role with the ability to search prior authorizations |
| Prior Authorization Submit | Agent role with the ability to submit prior authorizations |
| Provider Payment Innovation Reports Agent | Agent role with the ability to view the HAVEn reports |
| Retrieve Reports | Agent role with the ability to retrieve various provider reports |
| RHC Cost Report Upload | Agent role with the ability to upload RHC Cost Reports |
| Sign Approve LTC Cost Report | Agent role with the ability to approve LTC Cost Reports and Trade Files |
| Sign Certify FQHC Cost Report | Agent role with the ability to approve FQHC Cost Reports |
| Sign Certify Hospital Cost Report | Agent role with the ability to approve hospital Cost Reports |
| Sign Certify MSP Cost Reports | Agent role with the ability to approve MSP Cost Reports |
| Sign Certify OHF Cost Report | Agent role with the ability to approve OHF Cost Reports |
| Sign Certify RHC Cost Report | Agent role with the ability to approve RHC Cost Reports |
| Trade Files | Agent role with the ability to view Trade Files in MITS |
| View FQHC Cost Report | Agent role with the ability to view FQHC Cost Reports |
| View Hospital Cost Report | Agent role with the ability to view Hospital Cost Reports |
| View LI Cost Report | Agent role with the ability to view LI Cost Reports |
| View LTC Cost Report | Agent role with the ability to view LTC Cost Reports and Trade Files |
| View MSP Cost Report Due Date | Agent role with the ability to view MSP Cost Report Due Date |
| View MSP Cost Reports | Agent role with the ability to view MSP Cost Reports |
| View OHF Cost Report | Agent role with the ability to view OHF Cost Reports |
| View Provider Reports | Agent role with the ability to view Provider Reports in PNM |
| View Remittance Advices | Agent role with the ability to view remittance advice |
| View RHC Cost Report | Agent role with the ability to view RHC Cost Reports |
| View SURS | Agent role needed to view SURS File Type Overpayment Letter and SURS Reconsideration Response |

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