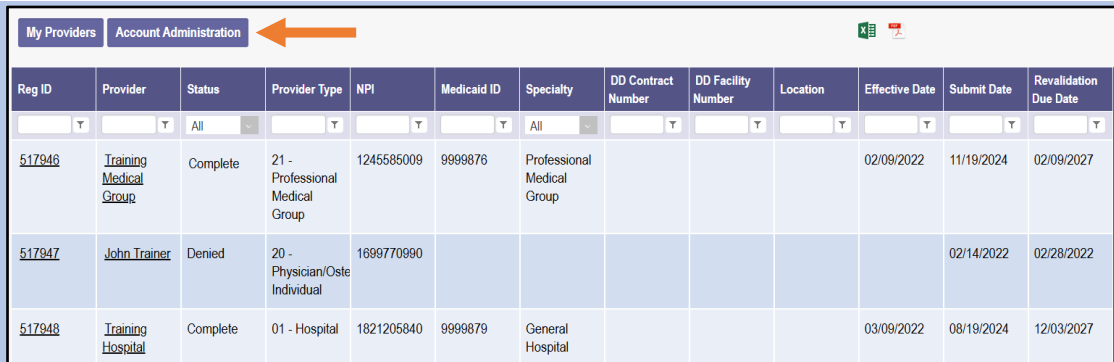


QRG: Cost Report Management Agent Assigning Agents in PNM

Steps:

A Provider Agent who has been assigned the 'Cost Report Management Agent' role/action by the Provider Administrator for a Medicaid ID is able to complete the following steps. To obtain this role/action, contact the Provider Administrator for the Medicaid ID to be assigned.

1



Reg ID	Provider	Status	Provider Type	NPI	Medicaid ID	Specialty	DD Contract Number	DD Facility Number	Location	Effective Date	Submit Date	Revalidation Due Date
517946	Training Medical Group	Complete	21 - Professional Medical Group	1245585009	9999876	Professional Medical Group				02/09/2022	11/19/2024	02/09/2027
517947	John Trainer	Denied	20 - Physician/Oste Individual	1899770990							02/14/2022	02/28/2022
517948	Training Hospital	Complete	01 - Hospital	1821205840	9999879	General Hospital				03/09/2022	08/19/2024	12/03/2027

A Provider Agent user, who has been previously assigned the 'Cost Report Management Agent', role/action can assign other Provider Agent users with Agent role/actions related to cost reports. These are abilities to view cost reports for specific providers (Medicaid IDs).

To begin this process, click the **Account Administration** button on your homepage/dashboard.

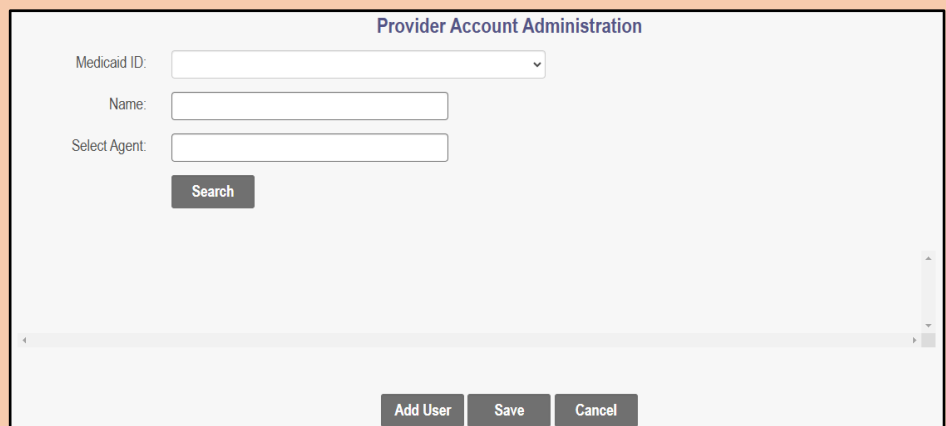
(The Account Administration button will not appear for Agents without the 'Cost Report Management Agent' role.)

2

From the drop-down menu, select the **Medicaid ID** of the provider for which you want to grant the Agent the cost report role(s).

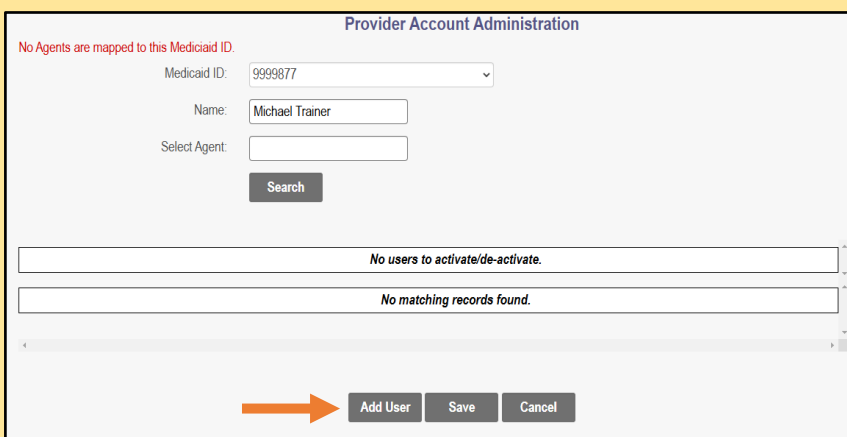
Once a Medicaid ID is selected, the 'Name' line will populate, allowing you to confirm you have selected the correct provider.

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



Note: The Medicaid IDs that will appear in the drop-down menu are only the Medicaid IDs in which the Provider Agent has been granted the 'Cost Report Management Agent' role/action by the Provider Administrator.

3



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

Note: If no Agent users have been previously assigned to a Medicaid ID, the "No users..." and "No matching records..." messages display.

QRG: Cost Report Management Agent Assigning Agents in PNM

Steps:

4

The form is titled 'User Information' and contains three input fields: 'OHID*' with the value '79988776', 'Email Address*' with the value 'test@test.com', and 'Confirm Email*' with the value 'test@test.com'. Below the email fields is a note: 'This is the email address used to create the OH|ID'. At the bottom right are two buttons: 'Save' and 'Cancel'.

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 Provider Agent you wish to assign cost report roles/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 a cost report role/action.

5

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

**A full list of available cost report roles/actions is listed on [Page 3](#) 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.

The Agent will now have the "Cost Report and Rate Setting" link appear under 'Self Service Selections' on the Provider Management Home page for the Medicaid ID.

The screen shows a list of actions for Agent 'Tammy Trainer' (OHID: 79988776). The 'Deactivate User' button is 'De-activate'. The list of actions includes: 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 (checked), View Provider Reports, Prepare Save MSP Cost Reports, Sign Certify MSP Cost Reports, View MSP Cost Reports, View MSP Cost Report Due Date, and Prenatal Visit. At the bottom are buttons: 'Add User', 'Save', and 'Cancel'.

6

This is a duplicate of the screenshot in Step 5, showing the 'Action' assignment screen for Agent 'Tammy Trainer' (OHID: 79988776). The 'View LTC Cost Report' checkbox is checked. Buttons at the bottom are 'Add User', 'Save', and 'Cancel'.

The next time this provider (Medicaid ID) is accessed through the Account Administration screen, all Agents assigned cost reports roles/action for 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 cost report roles/actions, click the check box for each action and click **Save**.

To remove cost report roles/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** (see image on Step 5).

If the 'De-activate' button is grayed out (see image on Step 6), this indicates that the Agent assignment was made by the Provider Administrator and therefore needs to be 'de-activated' by that Provider Administrator user.

Cost Report Agent Roles That Can Be Assigned:

<u>Role Name</u>	<u>Description</u>
FQHC Cost Report Upload	Agent role with the ability to upload FQHC Cost Reports
Hospital Cost Report Upload	Agent role with the ability to upload Hospital Cost Reports
OHF Cost Report Upload	Agent role with the ability to upload OHF Cost Reports
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
RHC Cost Report Upload	Agent role with the ability to upload RHC Cost Reports
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 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 RHC Cost Report	Agent role with the ability to view RHC Cost Reports

The cost report role/action options that appear for the Provider Agent assigned the 'Cost Report Management Agent' role/action in PNM are dependent upon the provider type selected for the Medicaid ID.

If a cost report Agent role/action selection is not available for that provider type, the checkbox (indicated on Step 5), will be grayed out.