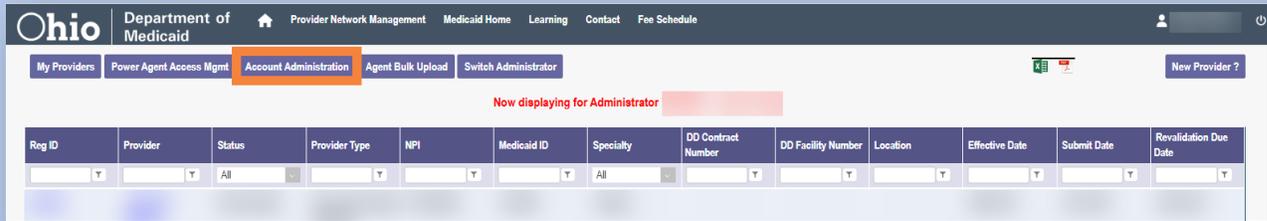


# Quick Reference Guide: Agent Assignment and Actions

## Steps:

- 1 A user with a Provider Administrator or Power Agent role can assign users with a Provider Agent role abilities to complete actions for specific providers (Medicaid IDs).



- To begin this process, 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 dropdown menu, select the **Medicaid ID** of the provider for which you want the Agent to complete actions.
- Click **Search** to view the Provider's Agent details.

## 3

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

*Note: 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."*

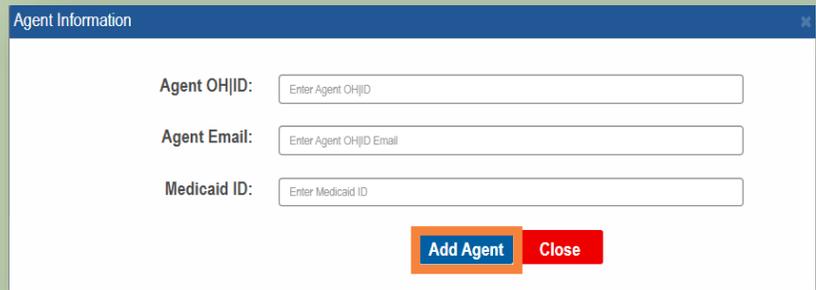
# Quick Reference Guide: Agent Assignment and Actions

## Steps:

4

In the **Agent Information** dialog box enter one or more of the following:

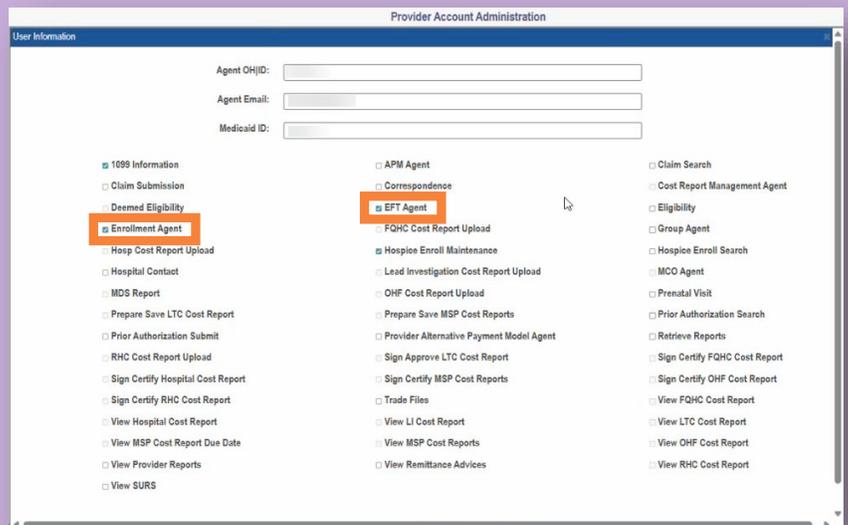
- The **Agent OHID**
- The **Agent Email** associated with the Agent OHID
- The **Medicaid ID** of the provider the Agent is being assigned to.
- The, Click the **Add Agent** button.



5

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

- **'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.

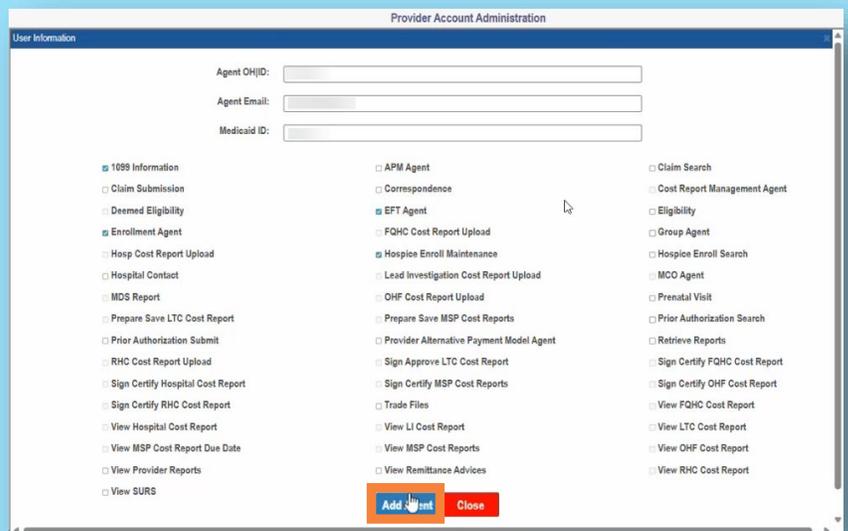


6

- After selecting the Agent roles for the Agent and Medicaid ID, scroll down and click the **Add Agent** button.
- For more details on specific roles/actions, please see pages 3-5 of this QRG.

**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.*



# Quick Reference Guide: Agent Assignment and Actions

## Steps:

7

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

- At any time, you may click **Edit** to change actions/roles for that Agent.
- After any changes, click **Save**.

The screenshot shows the 'Provider Account Administration' interface. At the top, there are search filters for 'Medicaid ID', 'Agent Sub Role', and 'Agent ID'. Below these are buttons for 'Search', 'Add New Agent', 'Reassign Admin', and 'Clear'. A table below lists agents with columns for 'Medicaid ID', 'Provider Name', 'Agent OH ID', 'Agent Name', and 'Agent Roles'. The first agent's row has 'Edit' and 'Deactivate' buttons, with the 'Edit' button highlighted by an orange box.

8

To Deactivate an Agent from the chosen Medicaid ID, click the corresponding **Deactivate** button.

This screenshot is similar to the previous one, but the 'Deactivate' button for the first agent in the table is highlighted with an orange box.

The dialog box contains the text: 'localhost:44300 says Are you sure to delete agent: [redacted] for Medicaid ID: [redacted]'. There are 'OK' and 'Cancel' buttons at the bottom, with the 'OK' button highlighted by an orange box.

- Click **OK** to confirm deactivating the Agent ID and Medicaid ID listed in the dialog box.

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

## Agent Roles/Actions:

Role Names	Description
1099 Information	Agent role with the ability to update 1099 Information
APM Agent	Allows agents access to submit CPC and CMC enrollment applications and upload supplemental clinical documents for CPC
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

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: Agent Assignment and Actions

## Agent Roles/Actions:

<u>Role Names</u>	<u>Description</u>
Cost Report Management Agent	Allows Provider Agent ability to see and use the 'Account Administration' button to manage Agent access (related to Cost Reports) for Medicaid IDs assigned to them
Deemed Eligibility	Agent role needed for access to Ohio Benefit's Eligibility Portal
EFT Agent	Agent role with the access to view and make updates to the Electronic Funds Transfer (EFT) page
Eligibility	Agent role with the ability to search for recipient eligibility
Enrollment Agent <i>(must be selected for an Agent to have the 'View Provider File' link under Self Service)</i>	Agent role with the ability to update provider information, submit revalidations, and respond to a Return to Provider (RTP) 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 the 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
Prior Authorization Search	Agent role with the ability to search prior authorizations
Prior Authorization Submit	Agent role with the ability to submit prior authorizations
Retrieve Reports	Agent role with the ability to retrieve various provider reports

# Quick Reference Guide: Agent Assignment and Actions

## Agent Roles/Actions:

<u>Role Name</u>	<u>Description</u>
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

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