

# Quick Reference Guide: Agent Assignment and Actions

## Steps:

### 1

The screenshot shows the Ohio Department of Medicaid Provider Network Management dashboard. At the top, there are navigation links: Menu, Ohio Department of Medicaid, Home, Provider Network Management, Medicaid Home, Learning, Contact, Fee Schedule, Training, and Log out. Below the navigation, there are two buttons: 'My Providers' and 'Account Administration', with an orange arrow pointing to the latter. A 'New Provider?' button is also visible. Below the buttons is a table with 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 for provider 'John Trainer' with Medicaid ID '0000204'.

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.

The screenshot shows the 'Provider Account Administration' form. It has fields for 'Medicaid ID' (a dropdown menu), 'Name' (a text input field), and 'Select Agent' (a text input field). There is a 'Change admin to:' field with a text input and a 'Change Admin' button. A 'Search' button is located below the 'Select Agent' field. At the bottom of the form are 'Add User', 'Save', and 'Cancel' buttons.

### 3

The screenshot shows the 'Provider Account Administration' form with the 'Medicaid ID' set to '9999883' and the 'Name' set to 'Test Training'. The 'Search' button is highlighted with an orange arrow. Below the search fields, there are two messages: 'No users to activate/de-activate.' and 'No matching records found.' At the bottom of the form, there are 'Add User', 'Save', and 'Cancel' buttons, with an orange arrow pointing to the 'Add User' button. The page number 'Page 1 of 1' is visible at the bottom right.

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.*

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## Steps:

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User Information	
OHID*	<input type="text" value="78654321"/>
Email Address*	<input type="text" value="test@test.com"/>
	<small>This is the email address used to create the OH ID</small>
Confirm Email*	<input type="text" value="test@test.com"/>
<input type="button" value="Save"/> <input type="button" value="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 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.*

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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.*

<b>Action</b>	79988776
<b>Agent Name</b>	Tammy Trainer
Deactivate User	<input type="button" value="De-activate"/>
<b>Agent Role</b>	79988776
Hospital Contact	<input type="checkbox"/>
Hosp Cost Report Upload	<input type="checkbox"/>
Hospice Enroll Search	<input type="checkbox"/>
Hospice Enroll Maintenance	<input type="checkbox"/>
Prior Authorization Submit	<input type="checkbox"/>
Prior Authorization Search	<input type="checkbox"/>
Eligibility	<input type="checkbox"/>
Claim Search	<input type="checkbox"/>
Claim Submission	<input type="checkbox"/>
1099 Information	<input type="checkbox"/>
View Remittance Advices	<input type="checkbox"/>
Deemed Eligibility	<input type="checkbox"/>
Sign Approve LTC Cost Report	<input type="checkbox"/>

6

<b>Action</b>	79988776
<b>Agent Name</b>	Tammy Trainer
Deactivate User	<input type="button" value="De-activate"/>
CPC Agent	<input type="checkbox"/>
Correspondence	<input checked="" type="checkbox"/>
FQHC Cost Report Upload	<input type="checkbox"/>
View FQHC Cost Report	<input type="checkbox"/>
RHC Cost Report Upload	<input type="checkbox"/>
View RHC Cost Report	<input type="checkbox"/>
Lead Investigation Cost Report Upload	<input type="checkbox"/>
View LI Cost Report	<input type="checkbox"/>
View Hospital Cost Report	<input type="checkbox"/>
MDS Report	<input type="checkbox"/>
OHF Cost Report Upload	<input type="checkbox"/>
View OHF Cost Report	<input type="checkbox"/>
Enrollment Agent	<input checked="" type="checkbox"/>
Trade Files	<input type="checkbox"/>
<input type="button" value="Add User"/> <input type="button" value="Save"/> <input type="button" value="Cancel"/>	

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:

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

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## Agent Roles/Actions:

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