

# Quick Reference Guide: Provider Healthcare Portal: Managing Delegate Assignments

## Introduction

This quick reference guide outlines the procedures to add a new delegate account to a provider or Managed Care Entity (MCE) in the Provider Healthcare Portal (Portal), to add a registered delegate to a provider or MCE, or to edit the authorized functions or status of a delegate that has been assigned to a provider or MCE.

## Topics Covered:

- ✓ What is a Delegate?
- ✓ Adding a New Delegate to the Portal
- ✓ Adding a Registered Delegate to a Provider or MCE
- ✓ Delegate Status
- ✓ Editing a Delegate's Status

## What is a delegate?

A delegate is an individual designated by an Indiana Health Coverage Programs (IHCP) provider or an MCE to use the Portal functions on behalf of the provider or MCE.

After a provider or MCE has registered in the Portal, the provider or MCE can add delegates to their delegate list and authorize those delegates to use Portal functions for that provider or MCE.

## Adding a new delegate to the Portal

After a provider or MCE has logged into their Portal account, the provider or MCE can add a new delegate account to the Portal by following this procedure:

1. On the provider or MCE *My Home* page, click **Manage Accounts** in the User Details box (*Figure 1*).

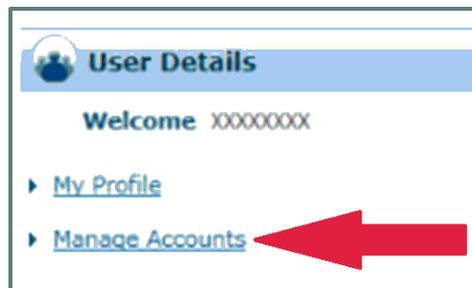


Figure 1: Manage Accounts Link

2. Under the Add New Delegate tab (*Figure 2*), enter the delegate's required information. **Note: The required information is the delegate's first and last name, his or her birth date, and the last four digits of his or her driver's license number (DLN). If the new delegate has no driver's license, enter four digits of your choice as a substitute for the four digits from the DLN.**

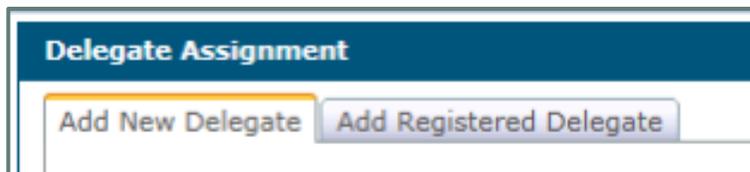


Figure 2: Add New Delegate Tab

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- In the Functions area of the *Delegate Assignment* page, select the functions that the delegate will be authorized to access for the provider or MCE by clicking in one or more applicable boxes (*Figure 3*).  
**Note: The list of available delegate functions differs between providers and MCEs.**

Select the functions that the delegate is authorized to access.  
(At least one function must be selected)

\*Functions

- Care Management - Submit Resubmit Authorization
- Care Management - View Authorization
- Claim - Inquiry
- Claim - Submit and Resubmit
- Disenroll
- MAPIR
- Member Focus Viewing
- Notification of Pregnancy Inquiry
- Payment History - Inquiry
- Provider Maintenance
- Revalidation
- Secure Correspondence
- Submit RCP Referral to Lock-In List
- Verify Eligibility

Figure 3: Authorized Functions – Provider Delegate

- Click **Submit** to advance to the *Confirmation* screen or **Cancel** to stop the process of adding a delegate account.
- On the *Confirmation* screen review the delegate information and authorized resubmit functions before choosing one of three options (*Figure 4*):
  - Click **Edit** to return to the *Delegate Assignment* page and change delegate information or function authorizations.
  - Click **Cancel** to stop the process of adding a delegate account.
  - Click **Confirm** to finalize the addition of the delegate. After clicking **Confirm**, a popup window will appear displaying a delegate code for the new delegate. **Note: After the new delegate is added by a provider or MCE, his or her delegate code will also display in the Delegates section of the *Delegate Assignment Page* (*Figure 5*).**

Add New Delegate

Click **Confirm** to confirm the request. Click **Cancel** to cancel it.

First Name XJohn  
Last Name XWilson  
Birth Date 01/01/1990  
Last 4 of DLN 4444

Functions

- Care Management - Submit Resubmit Authorization
- Care Management - View Authorization
- Claim - Inquiry
- Claim - Submit and Resubmit
- Disenroll
- MAPIR
- Member Focus Viewing
- Notification of Pregnancy Inquiry
- Payment History - Inquiry
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- Submit RCP Referral to Lock-In List
- Verify Eligibility

**Edit Confirm Cancel**

Figure 4: Confirmation Page - Provider Delegate

Delegate Assignment

Add New Delegate | Add Registered Delegate

\* Indicates a required field.  
Enter the fields below and click **Submit** to generate the delegate code for the new delegate to register.

\*First Name  
\*Last Name  
\*Birth Date  
\*Last 4 of DLN

Select the functions that the delegate is authorized to access.  
(At least one function must be selected)

\*Functions

- Care Management - Submit Resubmit Authorization
- Care Management - View Authorization
- Claim - Inquiry
- Claim - Submit and Resubmit
- Disenroll
- MAPIR
- Member Focus Viewing
- Notification of Pregnancy Inquiry
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**Submit Cancel**

Delegates

Click the Delegate's name to change the status and/or the functions of the delegate.

#	Name	Display Name	Birth Date	Last 4 of DLN	Delegate Code	Status
1	XWilson, XJohn	XJohn XWilson	01/01/1990	4444	20075	Active - Pending

Figure 5: Delegate Code Location – Provider Delegate

- Communicate the Delegate Code to the new delegate, and instruct the delegate to use the code to register a delegate account in the Portal to begin using Portal functions for the provider or MCE. **Note: It is the provider or MCE's responsibility to communicate the Delegate Code to the delegate. Communication will not be sent via the Portal to inform the delegate of his or her code.**



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## Adding a registered delegate to a Provider or MCE

A registered delegate is a delegate that already has an established account in the Portal. A registered delegate can be authorized by more than one provider or MCE to use provider or MCE authorized functions in the Portal.

After a provider or MCE has logged into their Portal account, the provider or MCE can add a registered delegate to use authorized Portal functions for the provider or MCE by following this procedure:

1. On the provider or MCE *My Home* page, click **Manage Accounts** in the User Details box (*Figure 1*).
2. On the *Delegate Assignment* page, click **Add Registered Delegate** (*Figure 6*).

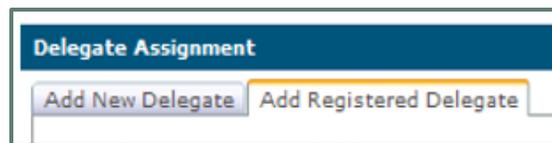


Figure 6: Add Registered Delegate

3. Under the Add Registered Delegate tab, enter the delegate's Last Name and Delegate Code (*Figure 7*).  
**Note: The delegate code must be obtained from the delegate. The delegate code is not searchable by a provider or MCE within the Portal.**

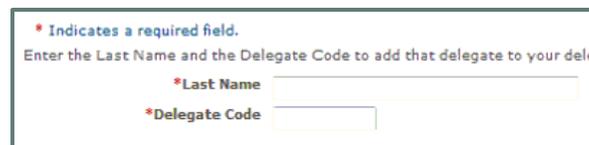
A screenshot of a form titled "Add Registered Delegate". It includes a legend: "\* Indicates a required field." Below the legend, there is a text prompt: "Enter the Last Name and the Delegate Code to add that delegate to your dele...". There are two input fields: "\*Last Name" and "\*Delegate Code".

Figure 7: Last Name and Delegate Code

4. In the Functions area on the *Delegate Assignment* page, select the functions that the delegate will be authorized to access for the provider or MCE by clicking in one or more applicable boxes.
5. Click **Submit** to advance to the *Confirmation* screen or **Cancel** to stop the process of adding a delegate account.
6. On the *Confirmation* screen, choose one of three options (*Figure 4*):
  - a. Click **Edit** to return to the *Delegate Assignment* page and change delegate information or function authorizations.
  - b. Click **Cancel** to stop the process of adding a delegate account.
  - c. Click **Confirm** to finalize the addition of the delegate.
7. Communicate to the registered delegate that he or she has been added to the delegate list of the provider or MCE.

## Delegate Status

A delegate that has been added by a provider or MCE defaults to a status of Active for the provider or MCE that added him or her. Having an Active status means the delegate can access authorized Portal functions for a provider or MCE that has added him or her.

A provider or MCE can change the status of an Active delegate to Inactive. Having a status of Inactive means a delegate cannot access authorized Portal functions for the provider or MCE that changed his or her status to Inactive.

A provider or MCE can change the status of an Inactive delegate to Active.



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## Editing a Delegate's Status or Authorized Functions

After a provider or MCE has added one or more delegates to their delegate list, the provider or MCE can edit a delegate's status or a delegate's authorized functions. Follow these steps to edit a delegate's status or his or her authorized functions:

1. On the provider or MCE *My Home* page, click **Manage Accounts** in the User Details Box (*Figure 1*).
2. In the Delegates section, located at the bottom of the *Delegate Assignment* page, click the delegate's name link (*Figure 8*).

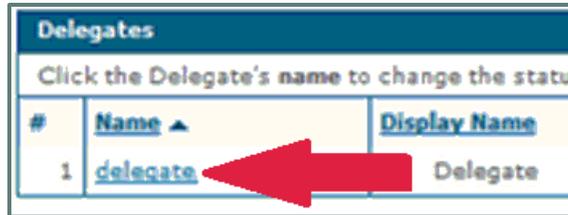


Figure 8: Delegate Name Link

3. Click the **Active** or **Inactive** radio buttons to change the delegate's status (*Figure 9*). **Note: When a delegate is assigned a status of Inactive, the delegate will no longer be able to access the Portal functions of the provider or MCE that assigned him or her the Inactive status. A delegate cannot be deleted from a provider's delegate list.**

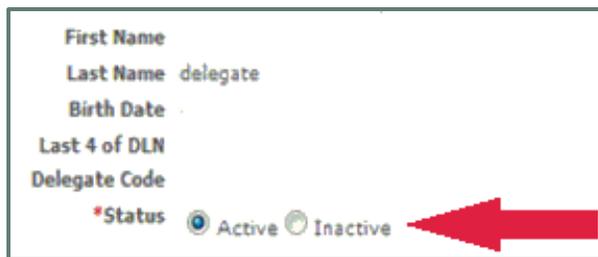


Figure 9: Active and Inactive Radio Buttons

4. For an Inactive delegate, skip to step 5. For an Active delegate, select the functions in the Functions area on the *Delegate Assignment* page that the delegate will be authorized to access for the provider or MCE by clicking in one or more applicable boxes.
5. Click **Submit** to advance to the *Confirmation* screen or **Cancel** to end the editing of the delegate.
6. On the *Confirmation* screen choose one of three options (*Figure 4*):
  - a. Click **Edit** to return to the *Delegate Assignment* page and edit the delegate's status or authorized functions.
  - b. Click **Cancel** to stop the process of editing a delegate account.
  - c. Click **Confirm** to finalize the editing of the delegate's status or their authorized functions.
7. Communicate to the registered delegate that their status or their authorized functions have been edited.