

Quick Reference Guide: Provider Healthcare Portal: Managing Delegate Assignments

Introduction

This quick reference guide (QRG) outlines the procedures for providers and managed care entities (MCEs) to add new delegates to the Provider Healthcare Portal (Portal), add registered delegates to their accounts. Additionally, it explains how to edit a delegate's status and authorized functions.

Topics Covered:

- ✓ What is a Delegate?
- ✓ Adding a New Delegate to the Portal
- ✓ Adding a Registered Delegate
- ✓ Changing a Delegate's Status
- ✓ Editing a Delegate's Authorized Functions

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.

Adding a New Delegate to the Portal

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 designated Portal functions.

To add a new delegate account to the Portal:

1. Log into the Portal.
2. Click **Manage Accounts** (**Figure 1**) in the User Details section of the My Home page to access the Delegate Assignment page.



Figure 1: Manage Accounts Link

Quick Reference Guide: Provider Healthcare Portal: Managing Delegate Assignments

3. Enter the delegate's required information (**Figure 2**) under the Add New Delegate tab:
 - a. First Name
 - b. Last Name
 - c. Birth Date
 - d. Last 4 (digits) of Driver's License Number

NOTE: If the new delegate does not have a driver's license, enter four digits of your choice as a substitute. Be sure to tell the delegate what the four-digit number is because it will be needed to complete the delegate's registration.

Delegate Assignment Back to My Home ?

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 Driver's License Number

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
- Manage Delegate Accounts
- MAPIR
- Member Focus Viewing
- Notification of Pregnancy Inquiry
- Payment History - Inquiry
- Provider Maintenance
- Provider Profile Inquiry
- Revalidation
- Secure Correspondence
- Submit RCP Referral to Lock-In List
- Verify Eligibility

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 Driver's License Number	Delegate Code	Status
1	XXSMITH, JOHN	Delegate01	01/01/1970	9999	10010	Active

Figure 2: Delegate Assignment Page (for Providers)



Quick Reference Guide: Provider Healthcare Portal: Managing Delegate Assignments

- Place a check inside the boxes next to the functions that the delegate will be authorized to access (**Figure 3**).

NOTE: The list of available delegate functions differs between providers and MCEs.

NOTE: The Manage Delegate Accounts function allows delegates to perform the procedures outlined in this QRG.

Delegate Assignment Back to My Home ?

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 Driver's License Number

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
- Manage Delegate Accounts
- MAPIR
- Member Focus Viewing
- Notification of Pregnancy Inquiry
- Payment History - Inquiry
- Provider Maintenance
- Provider Profile Inquiry
- Revalidation
- Secure Correspondence
- Submit RCP Referral to Lock-In List
- Verify Eligibility

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 Driver's License Number	Delegate Code	Status
1	XXSMITH, JOHN	Delegate01	01/01/1970	9999	10010	Active

Figure 3: Delegate Functions (for Providers)

- Click **Submit** (**Figure 3**) to advance to the next page for confirmation.



Quick Reference Guide: Provider Healthcare Portal: Managing Delegate Assignments

- Review the delegate information and authorized functions (**Figure 4**).
 - If you need to change any of this information or selected function, click **Edit**.
 - If you do not wish to add the delegate user, click **Cancel**.
 - If the information is correct, click **Confirm**.

Delegate Assignment Back to My Home ?

[Edit Delegate](#)

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

First Name John
Last Name XXSmith
Birth Date 01/01/1970
Last 4 of Driver's License Number 9999
Delegate Code 10010
Status Active

***Functions**

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

Edit **Confirm** **Cancel**

Figure 4: Delegate Information and Functions Confirmation

- Communicate the delegate code (**Figure 5**) displayed at the bottom of the Delegate Assignment page to the new delegate. Let the delegate know where to find the Online Registration training on indianamedicaid.com, and instruct the delegate to use the provided delegate 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.

Submit RCP Referral to Lock-In List
 Verify Eligibility

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 Driver's License Number	Delegate Code	Status
1	XXSMITH_JOHN	Delegate01	01/01/1970	9999	10010	Active

Figure 5: Delegate Code



Quick Reference Guide: Provider Healthcare Portal: Managing Delegate Assignments

Adding a Registered Delegate

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 authorized Portal functions on their behalf.

To add a registered delegate and authorize functions:

1. Log into the Portal.
2. Click **Manage Accounts (Figure 1)**.
3. Click the **Add Registered Delegate** tab (**Figure 6**).
4. Enter the delegate's last name and delegate code (**Figure 6**).

NOTE: The delegate code is not searchable by a provider or MCE within the Portal and must be obtained from the delegate.

Delegate Assignment Back to My Home ?

Add New Delegate | **Add Registered Delegate**

* Indicates a required field.
Enter the Last Name and the Delegate Code to add that delegate to your delegate list then click **Submit** to proceed.

*Last Name
*Delegate Code

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
- Manage Delegate Accounts
- MAPIR
- Member Focus Viewing
- Notification of Pregnancy Inquiry
- Payment History - Inquiry
- Provider Maintenance
- Provider Profile Inquiry
- Revalidation
- Secure Correspondence
- Submit RCP Referral to Lock-In List
- Verify Eligibility

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 Driver's License Number	Delegate Code	Status
1	XSMITH, JOHN	Delegate01	01/01/1970	9999	10010	Active

Figure 6: Add Registered Delegate Tab

5. Select the functions that the delegate will be authorized to access (**Figure 6**).
6. Click **Submit (Figure 6)** to advance to the next page for confirmation.
7. Review the delegate information and authorized functions and click **Confirm (Figure 4)**.
8. Communicate with the registered delegate that he or she has been added to the delegate list.



Quick Reference Guide: Provider Healthcare Portal: Managing Delegate Assignments

Changing a Delegate's Status

When a delegate is added by a provider or MCE, the delegate's status defaults to Active (**Figure 7**). Having an Inactive status means that delegate cannot access authorized Portal functions for the provider or MCE.

NOTE: A delegate cannot be deleted from a provider's delegate list.

To change a delegate's status to inactive:

1. Log into the Portal.
2. Click **Manage Accounts (Figure 1)**.
3. Scroll to the bottom of the page and click the name link for the delegate (**Figure 7**).

#	Name	Display Name	Birth Date	Last 4 of Driver's License Number	Delegate Code	Status
1	XXSMITH, JOHN	Delegate01	01/01/1970	9999	10010	Active

Figure 7: Delegate Name Link and Status

4. Select the **Inactive** radio button (**Figure 8**).

Modify the fields below and click the **Submit** button to update the information.

First Name John
Last Name XXSmith
Birth Date 01/01/1970
Last 4 of Driver's License Number 9999
Delegate Code 10010
*Status Active Inactive

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
 Manage Delegate Accounts
 MAPR
 Member Focus Viewing
 Notification of Pregnancy Inquiry
 Payment History - Inquiry
 Provider Maintenance
 Provider Profile Inquiry
 Revalidation
 Secure Correspondence
 Submit RCP Referral to Lock-In List
 Verify Eligibility

Figure 8: Inactive Status Selection

5. Click **Submit (Figure 8)** to advance to the next page for confirmation.
6. Review the delegate information and authorized functions and click **Confirm (Figure 4)**.

Quick Reference Guide: Provider Healthcare Portal: Managing Delegate Assignments

Editing a Delegate's Authorized Functions

The provider or MCE can edit a delegate's authorized functions as needed.

To edit a delegate's authorized functions:

1. Log into the Portal.
2. Click **Manage Accounts (Figure 1)**.
3. Scroll to the bottom of the page and click the name link for the delegate (**Figure 7**).
4. Select or deselect the applicable functions (**Figure 9**).

The screenshot shows a web form titled "Delegate Assignment" with a "Back to My Home" link. The form has an "Edit Delegate" button and instructions to "Modify the fields below and click the Submit button to update the information." The fields include: First Name (John), Last Name (XXSmith), Birth Date (01/01/1970), Last 4 of Driver's License Number (9999), Delegate Code (10010), and Status (Active selected, Inactive unselected). Below these is a section for "Select the functions that the delegate is authorized to access. (At least one function must be selected)". A list of functions is shown with checkboxes: Care Management - Submit Resubmit Authorization (checked), Care Management - View Authorization (checked), Claim - Inquiry (unchecked), Claim - Submit and Resubmit (unchecked), Disenroll (unchecked), Manage Delegate Accounts (checked), MAPIR (unchecked), Member Focus Viewing (checked), Notification of Pregnancy Inquiry (checked), Payment History - Inquiry (unchecked), Provider Maintenance (unchecked), Provider Profile Inquiry (unchecked), Revalidation (unchecked), Secure Correspondence (unchecked), Submit RCP Referral to Lock-In List (unchecked), and Verify Eligibility (checked). A red box highlights the "Functions" list. At the bottom are "Submit" and "Cancel" buttons.

Figure 9: Edit Authorized Delegate Functions

5. Click **Submit (Figure 9)** to advance to the next page for confirmation.
6. Review the delegate information and authorized functions and click **Confirm (Figure 4)**.
7. Communicate with the delegate that authorized functions have been edited.