Virginia MCO/ASO Portal User Guide

Medicaid Management Solutions

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Note: This user manual is a draft document and will continue to be updated to reflect new functionality and User Interface (UI) changes as a result of future releases.

Privacy and Security Rules

The Health Insurance Portability and Accountability Act of 1996 (HIPAA – Public Law 104-191) and the HIPAA Privacy Final Rule[1] and the American Recovery and Reinvestment Act (ARRA) of 2009 requires that covered entities protect the privacy and security of individually identifiable health information.

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[1] 45 CFR Parts 160 and 164, Standards for Privacy of Individually Identifiable Health Information; Final Rule

Revision History

Version #	Published/ Revised	Author	Section/Nature of Change
0.1	03/2020	H. McIntire	Update for VA Specific functionality and to align with DXC standards
0.2	05/2020	A. Nunan	PRSS-UAT-P2-0430079: Updated section 6.1.2 and 6.1.2.3.1.2 to remove pending delegates Updated section 6.1.1.2 and 6.1.2.1 to clarify relationship code PRSS-UAT-P2-0505094: Updated section 5.2.1 to updated MCO status PRSS-UAT-P2-0430082: Updated sections 6.1.1.1 and 6.1.1.2 to replace screenshot to reflect delegates do not display SSN or DOB. Removed section 6.1.1.3 to reflect edit functionality is no longer available.
0.3	05/2020	A. Nunan	Updated screenshots to match environment upgrades.
0.4	06/2020	A. Nunan	Updated based on DMAS feedback.
0.5	08/2020	A. Nunan	Updated Audit history section to include a table of values. Updated Section 5.1 to clarify you do not need to change status to credentialing passed before changing status to contract approved.
0.6	09/2020	A. Nunan	Updated Section 5 to provide more detail on revalidation.
0.7	06/2021	A. Nunan	Updated with R18, R19, and R20 functionality. Draft created prior to UAT. Technical Writer Review by S. Berryman.

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1.Introduction

The purpose of this guide is to support Managed Care Organizations (MCOs) and Delegates of MCOs with an overview of the MCO Portal and instructions to process a provider application for participation in an MCO.

Throughout this guide, you will see various notes to enhance your use of MCO Portal. Refer to Table 1.

Indicates extra tips and useful explanations.	Indicates more resources are in another location such as another document or a website.	Indicates a critical step that you must take (or not take) to avoid errors.

Table 1 - User Guide Icons

Refer to Figure 1-1 for an overview of how the systems relevant to this guide are organized:

1. **Healthcare Solutions Modular Management System (HSMMS)** is a collaboration of modules which coordinate services between providers and members meeting a patient's health care needs. The healthcare data contained within the system must be controlled throughout its lifecycle, protected from exposure or loss, used only for the intended purpose, and accessed by only the intended users. Wherever sensitive data is present, strong key management systems are essential for the control, protection and preservation of the underlying data.

2. **Provider Services Solution (PRSS)** maintains comprehensive information on all enrolled providers and supports the claims processing, management reporting and surveillance, and utilization review functions of the health care plan.

3. **Managed Care Organization (MCO)/Administrative Services Organization (ASO) Portal** is an integral element of Healthcare Portals. MCO/ASO clerks use this portal to minimize paper transactions between the state and their associated MCOs/ASOs. This portal also plays a vital role in increasing the accuracy of decision-making between provider contracts and MCOs/ASOs. Additionally, the portal enables users to maintain profile information and allows primary users for an MCO/ASO to assign and maintain delegates who work on the behalf of primary users.
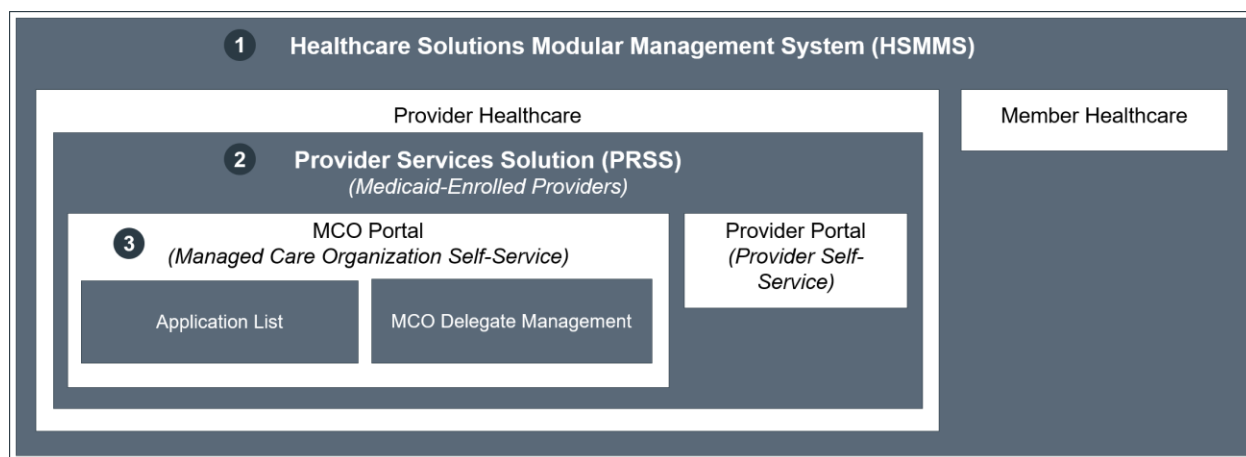
Figure 1-1 – MCO/ASO System Organization

A secure home page enables authenticated MCO/ASO Clerks to log in to the MCO/ASO Portal and perform business transactions.

The following are the primary business actions of the MCO Portal:

- Onboarding a provider into a contract with an MCO/ASO

- Managing the delegates of the MCO/ASO portal users

- View and update profile information

2.Information You Will Need

You need to have basic knowledge of MCOs/ASOs as well as the policies and procedures to approve and reject MCO participation request applications from Providers.

You need to have access to the MCO Portal (Username and Password). Refer to Section 4 - Medical Enterprise System (MES) Secure MCO Portal Access.

3. System Requirements

To successfully use all features of the MCO/ASO Portal, ensure that your computer system meets the following minimum requirements:

- Reliable online connection

- Latest version of your web browser is recommended

- Accept pop-ups from the site to view detail and attachment windows

- Adobe® Acrobat Reader.

4. Medical Enterprise System (MES) Secure MCO Portal Access

Authenticated MCO/ASOs and Delegates, log in through the MES Secure Login page to the MCO Portal to perform business transactions.

4.1 MCO Portal Registration – Delegates

Delegates must complete registration the first time that a Provider or MCO/ASO assigns them to manage functionality on their behalf. Once assigned, credentials are generated and sent via email to the Delegate.

Once registered, the delegate accesses all assigned MCOs from Switch Organizations in MCO/ASO Portal. Refer to Section **4.3 - Switch Organization - Delegate**.
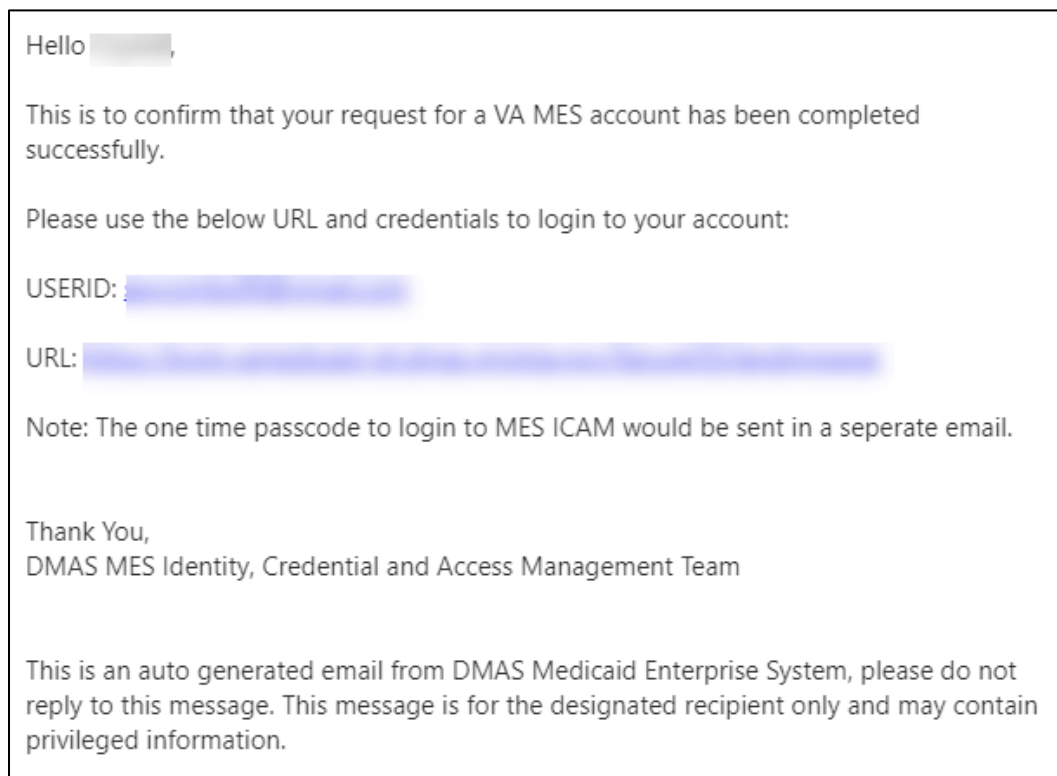
To complete registration, follow these steps:

1. Access your credentials which are delivered in two distinct registration emails. The first email includes your User Identification (ID) and hyperlink to access registration for MCO/ASO Portal. The second email includes your temporary password. Refer to Figure 4-1 and Figure 4-2.

Note: If you are also a delegate and have already received credentials, you will not receive another set.

Even if you have multiple Service Locations, you will only receive email credentials for the first Service Location as registration is only completed once.

Hello ____,

This is to confirm that your request for a VA MES account has been completed successfully.

Please use the below URL and credentials to login to your account:

USERID: ____

URL: ____

Note: The one time passcode to login to MES ICAM would be sent in a seperate email.

Thank You,
DMAS MES Identity, Credential and Access Management Team

This is an auto generated email from DMAS Medicaid Enterprise System, please do not reply to this message. This message is for the designated recipient only and may contain privileged information.

Figure 4-1 – MCO/ASO Portal Access Email 1

Hello ███,

This is to confirm that your request for a VA MES account has been completed
successfully.

Please use the below one time passcode to login to your account.

Password: ███████

Thank you,
DMAS MES Identity, Credential and Access Management Team

This is an auto generated email from DMAS Medicaid Enterprise System, please do not
reply to this message. This message is for the designated recipient only and may
contain privileged information.

Figure 4-2 – MCO/ASO Portal Access Email 2

*Note: Check your spam folder for your emails before contacting provider
support. The Subject line of both emails is "MES ICAM Account Creation
Confirmed."*

2. Click your hyperlink in MCO/ASO Portal Access Email 1 to open the **MES Log in** page.

3. Enter the emailed User ID and temporary password, then click **SIGN-IN.** Refer to Figure 4-3.
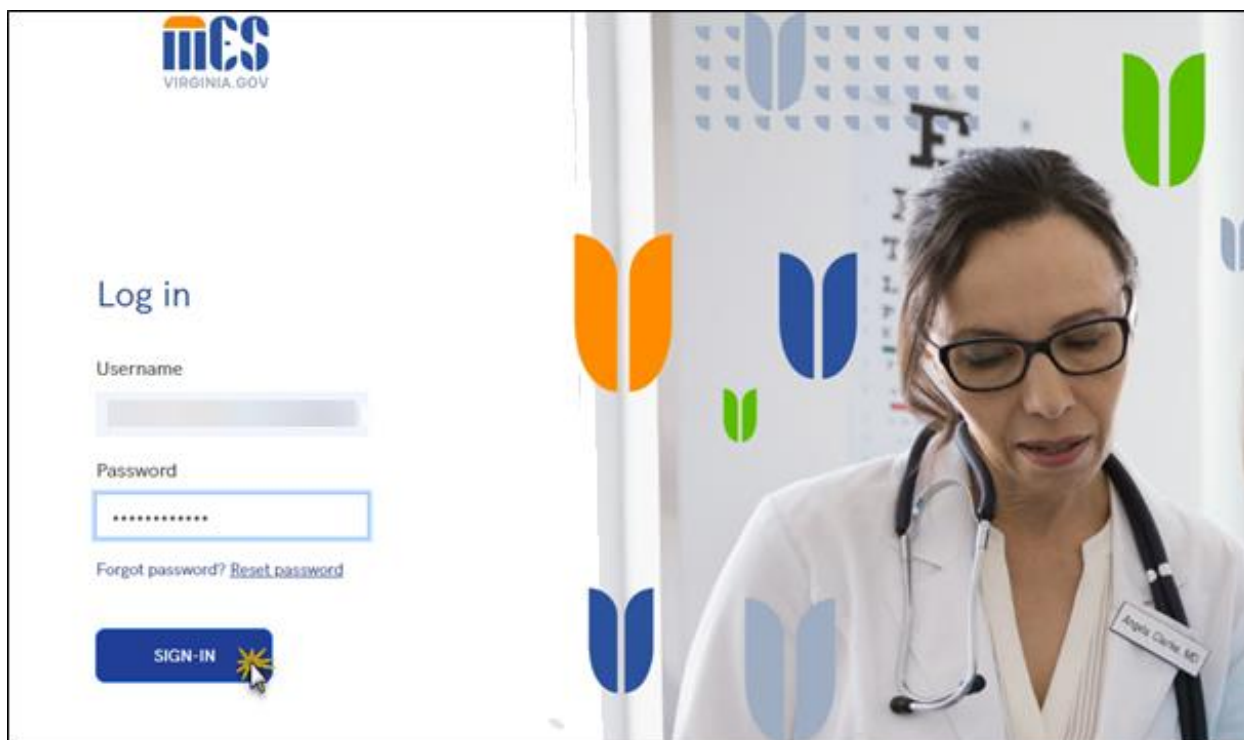
Figure 4-3 – MES Secure Login Page

4. The **Change Password** page appears. Enter your temporary password as your **Current Password**, then create a new password and confirm it.

5. Click **Set Password**. Refer to Figure 4-4.
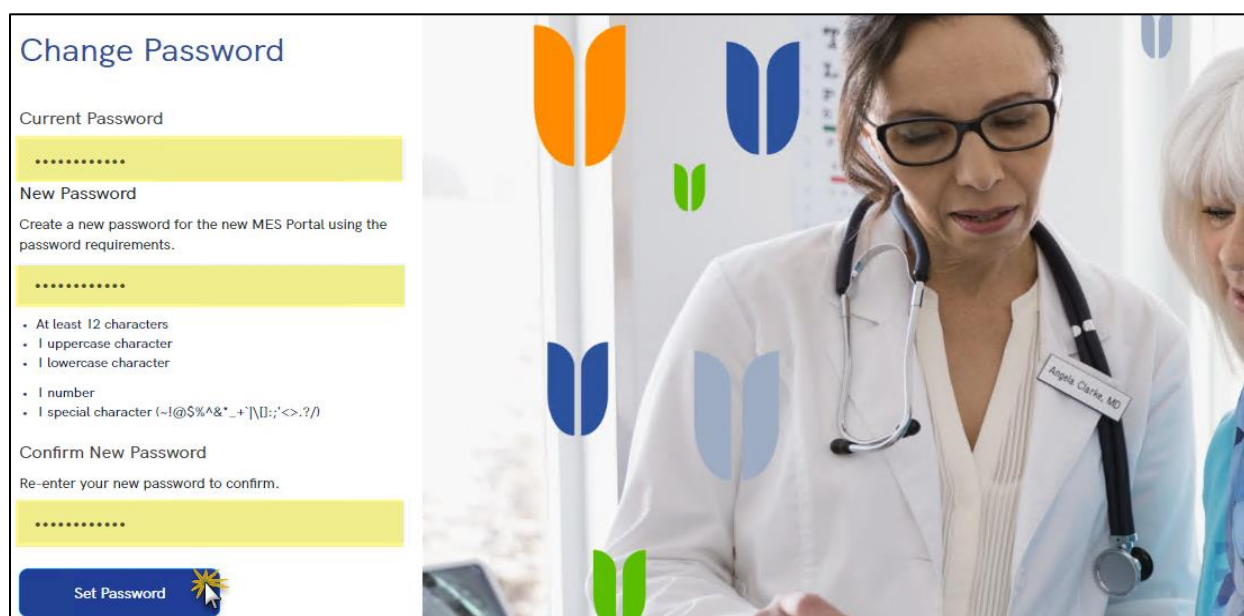
Figure 4-4 – Complete Registration

6. The **MES Landing** page appears. Refer to Figure 4-5.
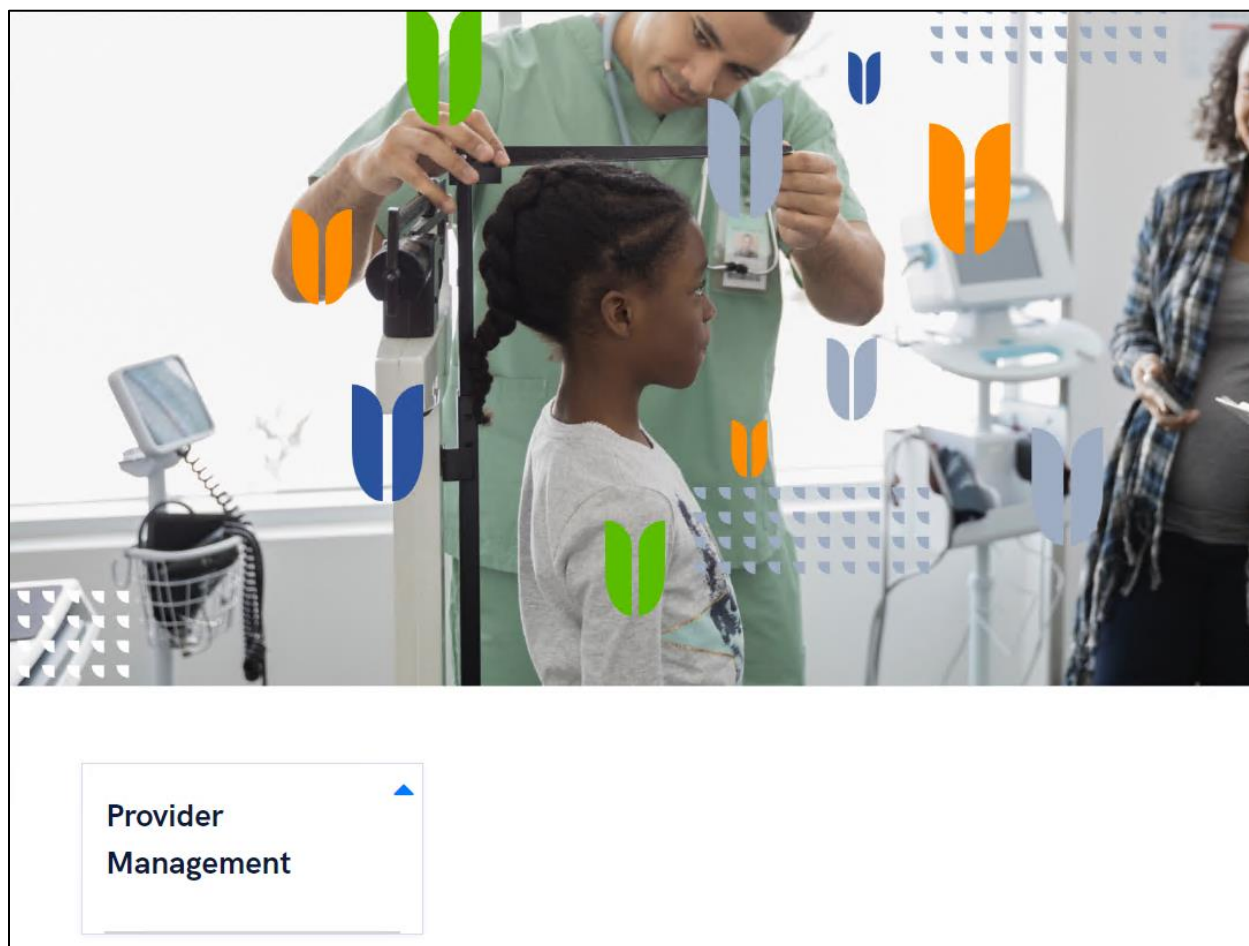
Figure 4-5 - MES Landing Page

Note: Depending on your credentials, you may have additional access tiles. This guide addresses MCO/ASO Portal within Provider Management.

4.2 MCO Portal Log in

Use your MES credentials to access your authorized functionality in MCO Portal. MCOs and Delegates log in with these steps.

1. Navigate to the **MES Secure Log in** page at

   https://login.vamedicaid.dmas.virginia.gov/SecureISS/landingpage.

2. Enter your **Username** and **Password**, then click **SIGN-IN**. Refer to Figure 4-6.

Figure 4-6 – MES Secure Log in Window

Note: If you forget your password, click the Reset password hyperlink.

3. Once you are signed into your account, the **MES Landing** page appears with the applications available to you. Refer to Figure 4-7.
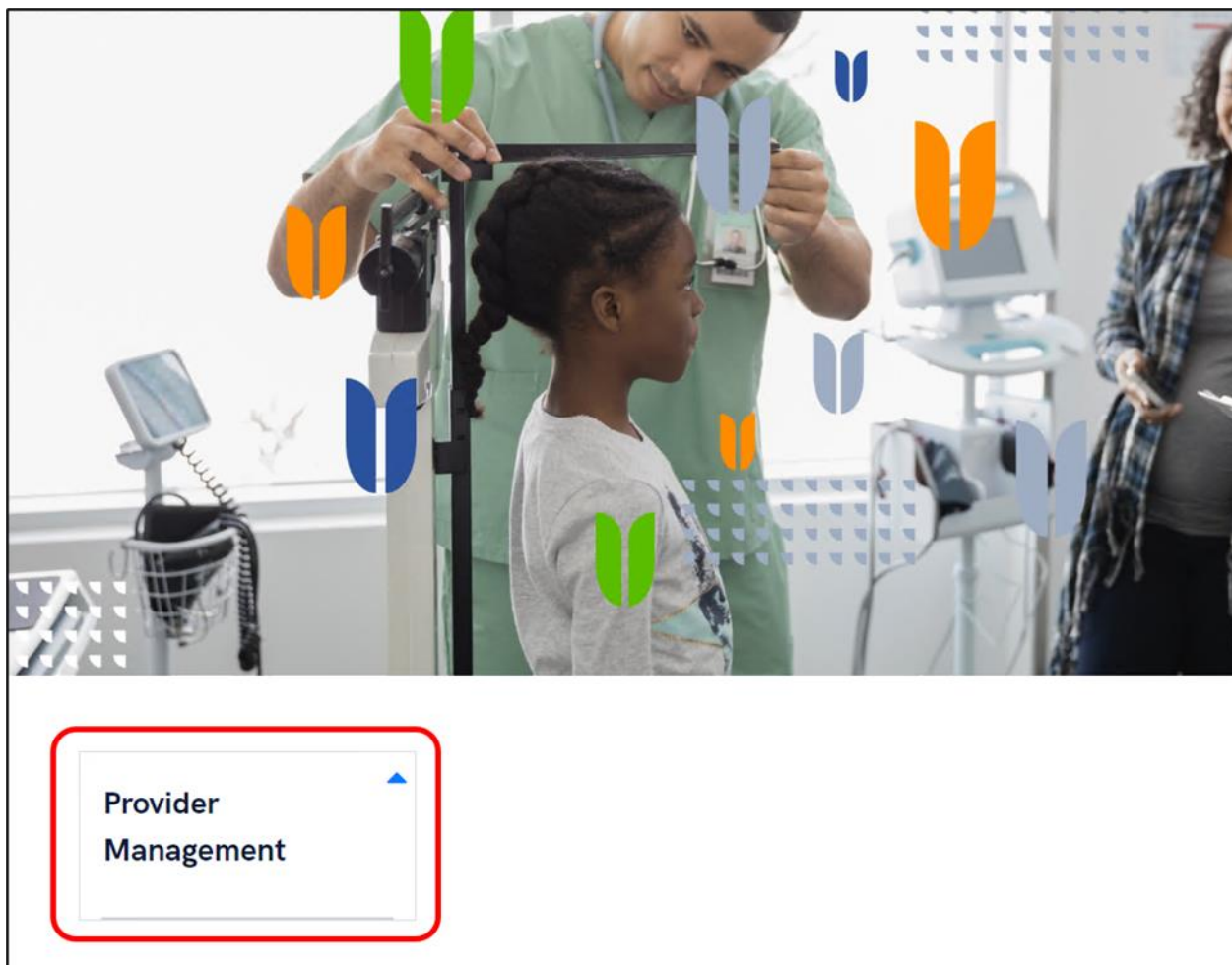
Figure 4-7 - MES Landing Page

4. Click the expand icon for the **Provider Management** application. Refer to Figure 4-8.
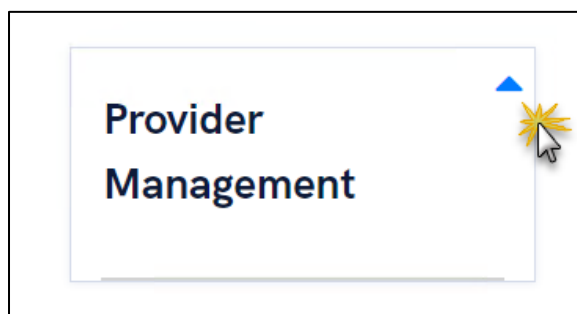
Figure 4-8 – Provider Management Expand Icon

5. Click the **PRSS Portal** hyperlink to access the Provider Portal. Refer to Figure 4-9.
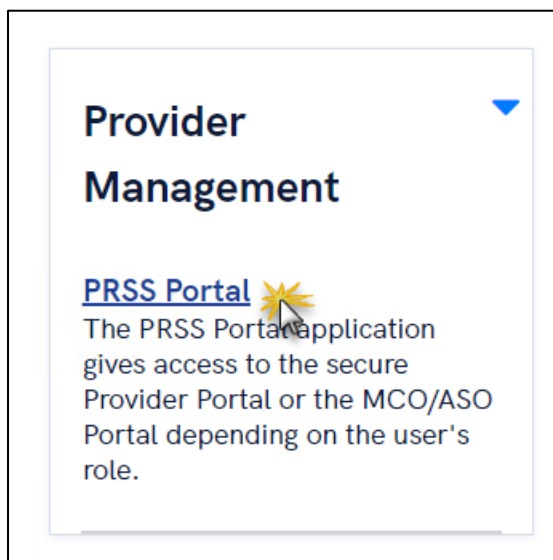
Figure 4-9 – PRSS Portal Hyperlink

6. The **MCO/ASO Portal Secure Home** page appears. Refer to Figure 4-10.

Figure 4-10 – MCO/ASO Portal Secure Home Page

4.3 Switch Organization - Delegate

When a delegate has been assigned to more than one organization, the Delegates page displays upon logging in. The Switch Organization feature enables delegates to select the organization(s) on whose behalf they want to work.

For delegates with multiple organizations, the Switch Organization feature enables them to switch between organizations without logging out of the portal.

To select an organization, complete the following steps:

1. Complete Section **4.1- MCO Portal Log in** steps.

2. The **Switch Organization** window appears rather than the **MCO/ASO Portal Secure Home** page. Click the Organization that you want to work on behalf of, then click **SUBMIT**. Refer Figure 4-11.
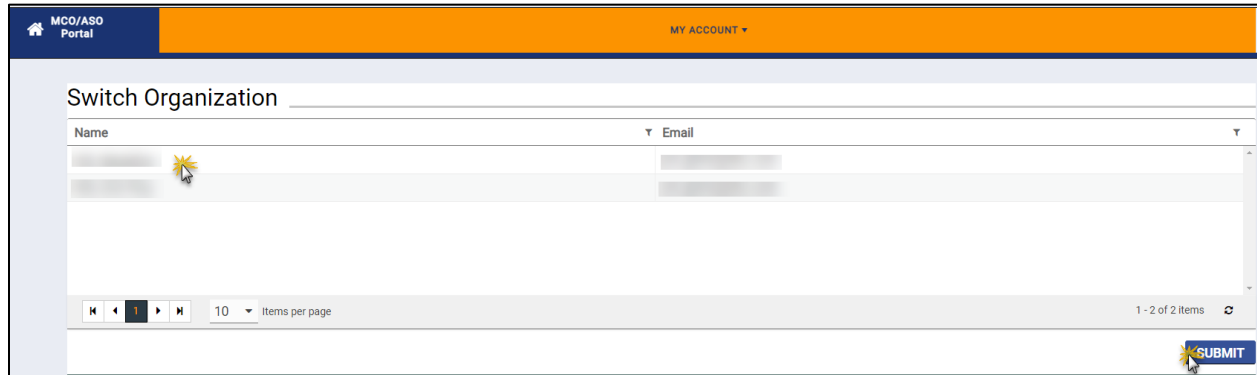
Figure 4-11 - Switch Organization

3. The Secure Home page displays for the selected Organization. Notice the **Delegate For** and **MCE ID** headings. This tells the user which organization they are working for. Refer Figure 4-12.
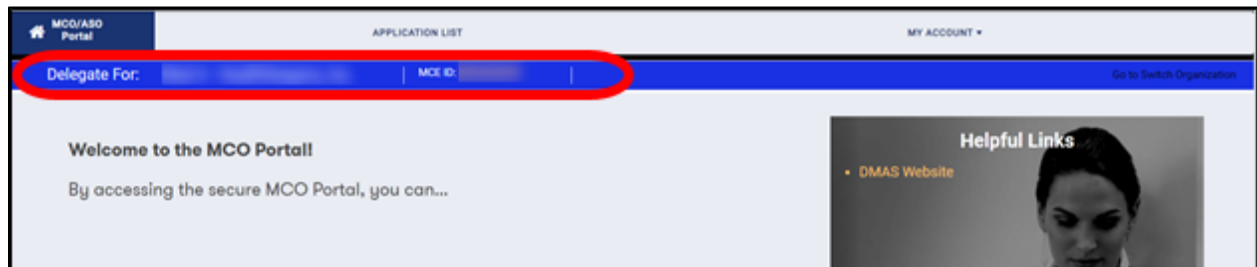
Figure 4-12 - Delegate Information Identifier Bar

4. To access a different Organization, return to **Switch Organization**. Refer to Figure 4-13.

   a. From the Navigation Menu, select **My Account** then click **Switch Organization**.

   b. From the Organization Identifier bar, click **Go to Switch Organization**.
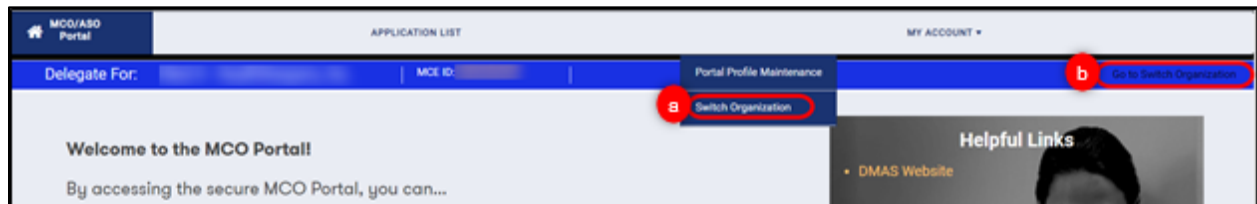
Figure 4-13 - Switch Organization

5. MES Secure MCO/ASO Portal Navigation

5.1 At-a-Glance Bar

Located at the top of the page, the At-a-Glance bar provides a list of all available functions from the current window. Refer to Figure 5-1 and Table 2 for an overview of the features. Refer to Figure 5-2 through Figure 5-5 for examples of each feature.
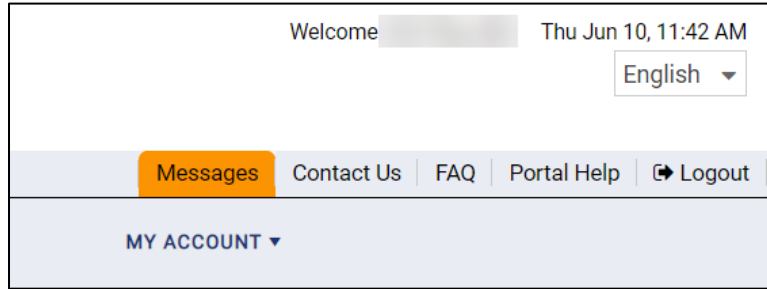
Figure 5-1 - At-a-Glance

Function	Description
Messages	View broadcast messages related to system outages, system upgrades, new system features, important information messages, and various other reasons. Broadcast messages display when you log in and are organized by the highest priority then sorted by effective date, with the most recent date first, and then alphabetically by message text. Any messages that need to be acknowledged are considered highest priority and thus display at the top of **Current Messages**. Select the **Read** check box to acknowledge.
Contact Us	View how to contact various departments for MCO/ASO support via email, phone (including an automated response line), or mail.
Frequently Asked Questions (FAQs)	View questions and answers related to common topics about or related to the information contained within MCO/ASO Portal.
Portal Help	View help topics about MCO/ASO Portal functionality and the kind of information available. MCO/ASO Help appears in a new window.
Logout	Securely log out of the MCO/ASO Portal.

Table 2 – At-a-Glance Bar
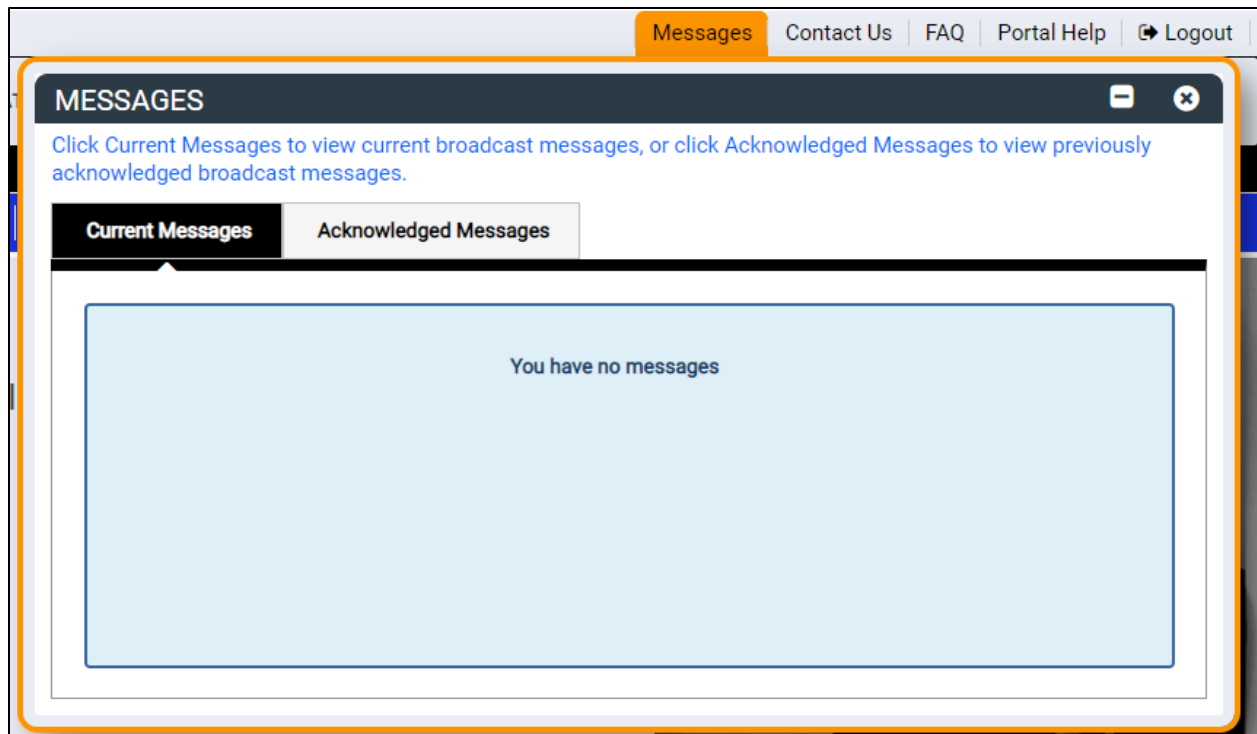
Figure 5-2 - At-a-Glance Bar: Messages

*Note: Select the **Read** check box to acknowledge a **Current Message**.*
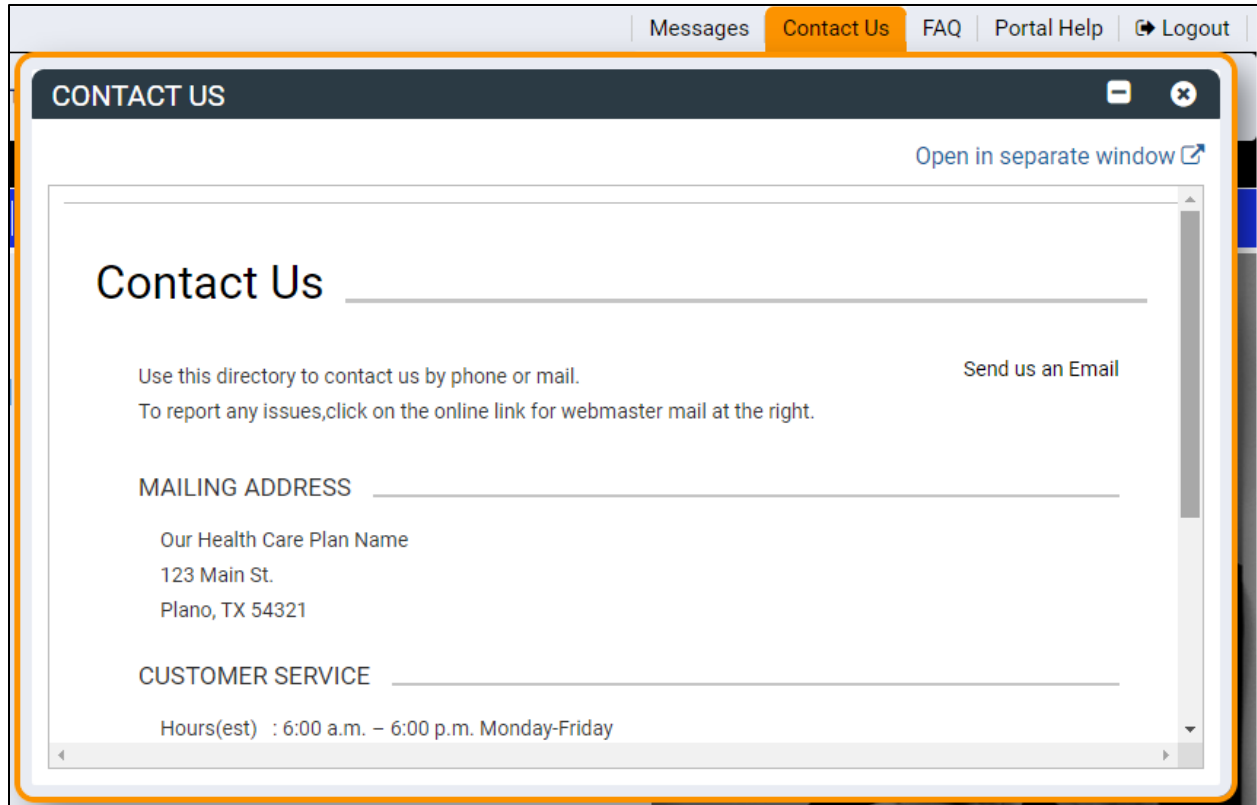
Figure 5-3 - At-a-Glance Bar: Contact Us

*Note: The **Send us an Email** hyperlink is used to contact the PRSS Enrollment and Management Clerks. This is particularly helpful if you need to submit additional supporting attachments for your enrollment, revalidation, or change request. Alternately, you can send an email to VAMedicaidProviderEnrollment@gainwelltechnologies.com.*
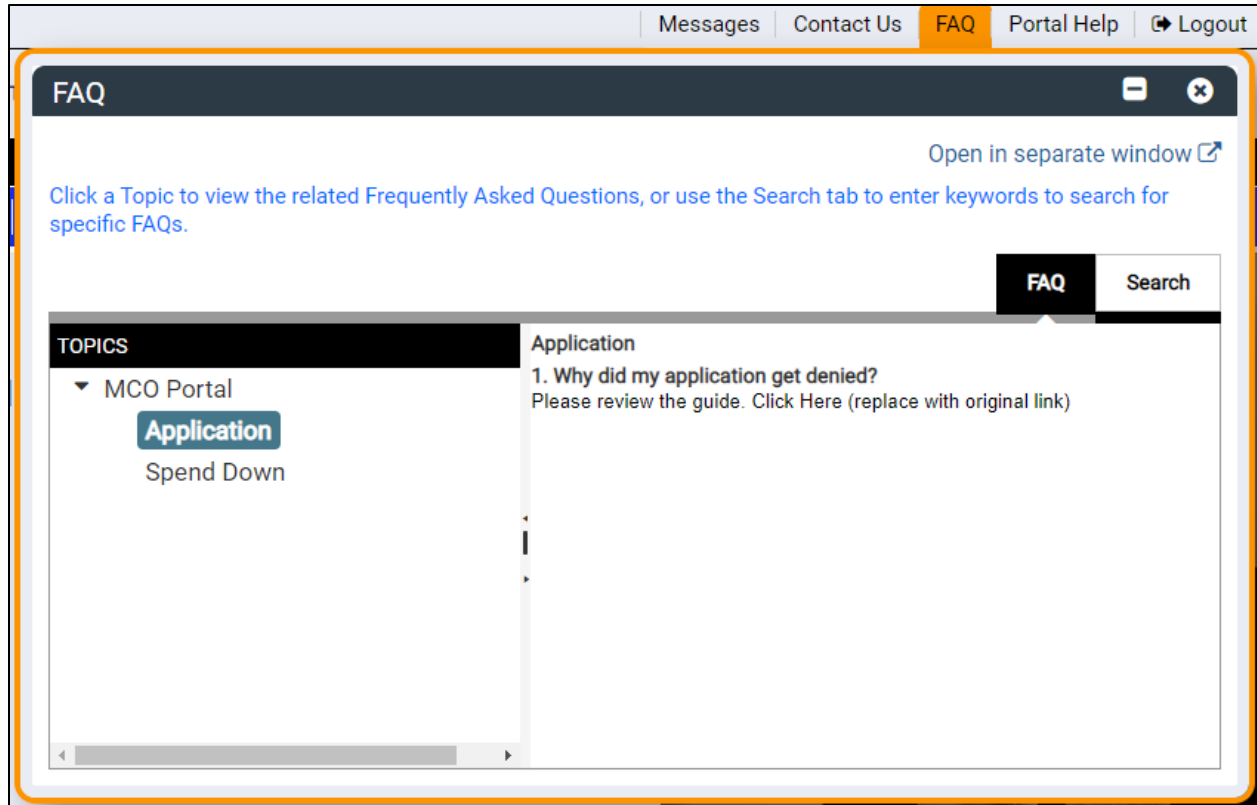
Figure 5-4 - At-a-Glance Bar: FAQ
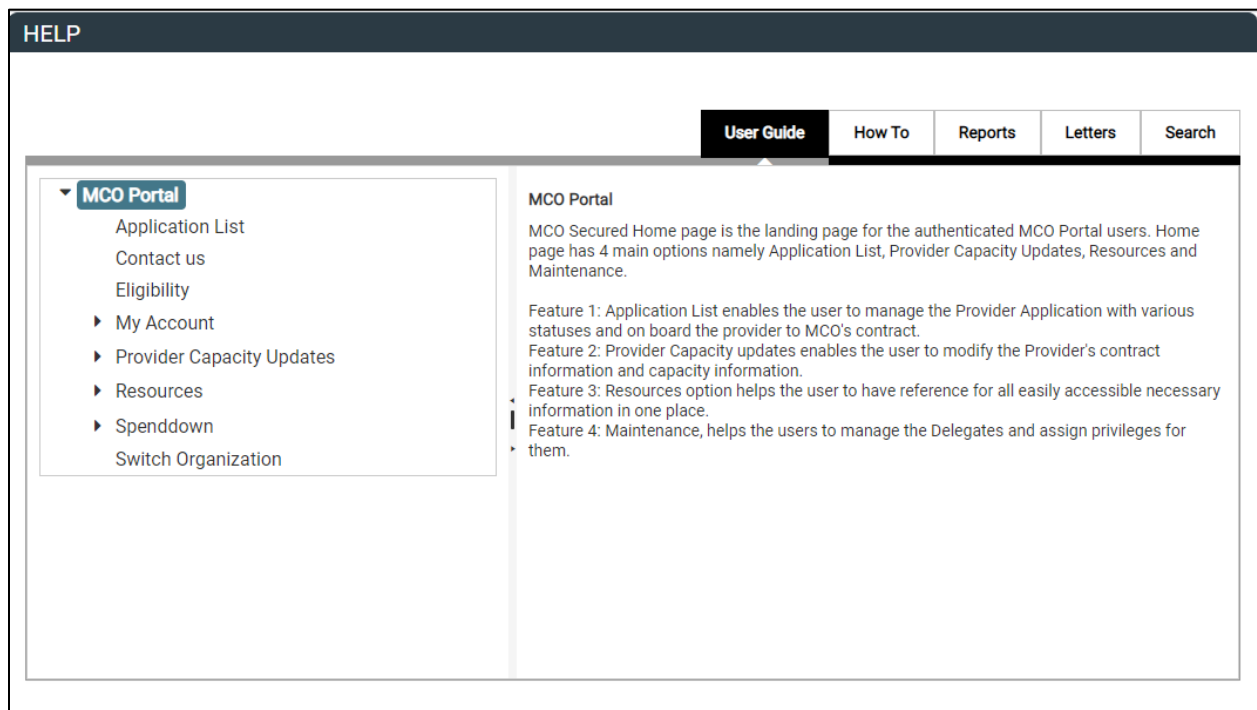
Figure 5-5 - At-a-Glance Bar: MCO Portal Help

5.2 Navigation

The Navigation Menu on the Home page provides access to the Application List and My Account. Refer to Figure 5-6.

Figure 5-6 - Navigation Menu

Refer to Table 3 for descriptions of the modules available from the **Navigation Menu.**

Function	Description
Application List	Provider application maintenance is one of the primary business transactions performed by MCO/ASO clerks. MCO/ASO clerks have a list of applications from providers who are already a part of the State Medicaid Program but do not yet have a contract with an MCO/ASO.
My Account	This function enables users to view and update their profile information and Manage Delegates.
Helpful Links	Configured by the client, enables the user to access frequently used external websites.

Table 3 - Primary Features

5.3 Interactive Features

Interactive features enable you to perform certain actions. The available interactive features depend on the functionality in the window. Refer to Table 4 for a listing and description of the interactive features.

Name	Icon	Description
Cancel	CANCEL	Cancels the search and closes the window or ignores changes and returns information to their original values.
Edit	EDIT	Allows changes to the record.
Filter	FILTER	Opens filter options for search results. Filters do not apply to all columns.
Help	?	Opens the system help page.
Paging	⏮ ◀ 1 2 3 ... ▶ ⏭	Navigate through search results using arrows or page numbers.
Reset	RESET	Resets any changes back to the last save point.

Name	Icon	Description
Save	**SAVE**	Saves any data entered in the add/edit windows.
Sort	▲ ▼	Sorts search results column in ascending or descending order. Sorting does not apply to all columns.
Tooltip	❓	Move over the icon to display help text for the field.
Zip File	🗜	Download the enrollment application and/or attachments in a zip file.
Update	**UPDATE**	Changes the **MCO Status** to the selected option.

Table 4 – Interactive Features

6. Application List

Provider application maintenance is one of the primary business transactions performed by MCO/ASO clerks. MCO/ASO clerks have a list of applications from providers who are already a part of the Virginia Medicaid Program but do not yet have a contract with an MCO/ASO.

1. To access the Application list, click **Application List** from the **Navigation Menu**. Refer to Figure 6-1.

Figure 6-1 - Application List

Note: The MCO Applications List is defaulted to show all applications in a Pending status only.

- Click the Filter icon ▼ on the column headers to apply or clear an existing filter.
- Click one of the sort icons ▲ ▼ on the column headers to change the order.
- You have the option to export the table data to Excel or a PDF with the buttons at the bottom of the list.

2. To view additional information about an application, click ▶ to expand row navigation to view additional fields. Refer to Figure 6-2.

Figure 6-2 – View Additional Fields

Option	Description
Type	The **Type** column indicates the type of application for the line in question. Application types include: • **New Enrollment**: A newly enrolled provider requests a contract with an MCO during enrollment. • **Reenrollment**: Provider who was previously enrolled reenrolls and selects an MCO at the time of reenrollment; • **New MCO**: An existing provider requests a contract with a new MCO through the Provider Portal; • **Revalidation Existing**: Provider is revalidating and has an existing MCO contract at the time of revalidation and requests enrollment with the same MCO; • **Revalidation New**: Provider is revalidating and has selected an MCO to participate with that the provider does not have an existing MC contract with.
Service Location ID	The **Service Location ID** field identifies the location at which the provider offers its services to members.
National Provider Identifier (NPI)	The **NPI** is a unique identification number for covered health care providers.
Name	The **Name** column shows the provider's business name.
Provider Type	The **Provider Type** column shows the kinds of services the provider offers.
Provider Specialty	The **Provider Specialty** column show the providers specialty as entered in enrollment application.
Published Date	Find the date the provider application became available in the **Published Date** column.
MCO Status	The **MCO Status** shows the enrollment status. Statuses include: • Acknowledged • Attachment Added • Attachment Required • Contract Accepted • Contract Rejected • Credentialing Failed

Option	Description
	• Credentialing Passed • Pending • Provider Declined • Retrieved • Cancelled
MCO Status Date	The **MCO Status Date** shows the date the application entered its current status.
Reason Code	The **Reason Code** defines the reason a clerk selected a specific MCO status.
Clerk ID	The **Clerk ID** column identifies who placed the application in its current status.

Table 5 - Elements of the MCO Applications Panel

6.1 Download MCO Application

The first step to working a MCO participation request application is downloading the enrollment application. The enrollment zip file contains a PDF of the provider's Virginia Medicaid enrollment application and the submitted attachments. The data captured in the enrollment PDF varies by enrollment and provider type and contains pertinent enrollment and contact information.

To download the provider's enrollment information, complete the following steps:

1. Click the **ZIP Icon** of a specific record under the **Enroll Info** column. Refer to Figure 6-3.
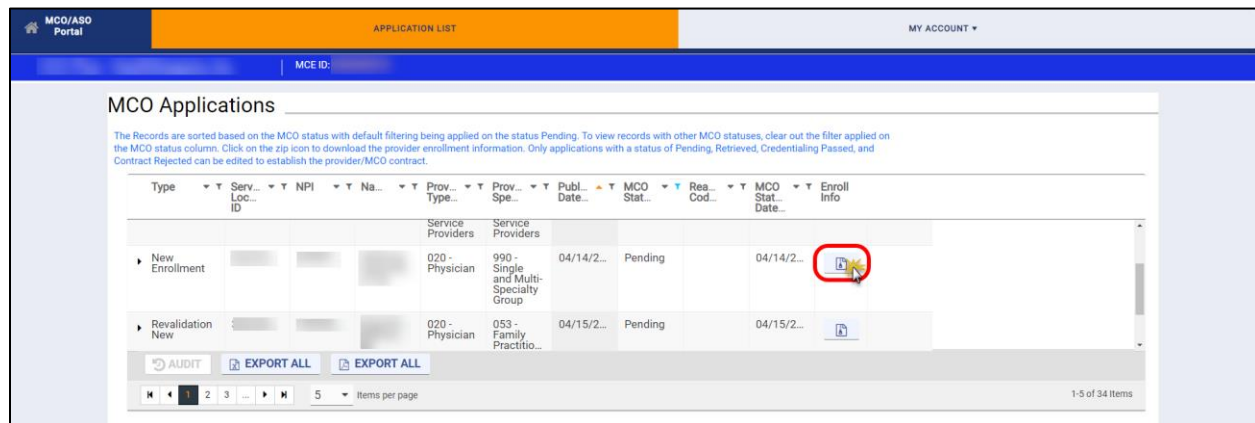
Figure 6-3 - Download Enrollment Info

*Note: To download a full list of applications, apply the filters to target your search and minimize generation time then click **Export All**.*

*Note: The **Published Date** is the date that the application was submitted to the MCO. This happens after the Provider is approved or revalidated with the Virginia Medicaid program.*

2. An Alert Confirmation displays. Click **OK**. Refer to Figure 6-4.
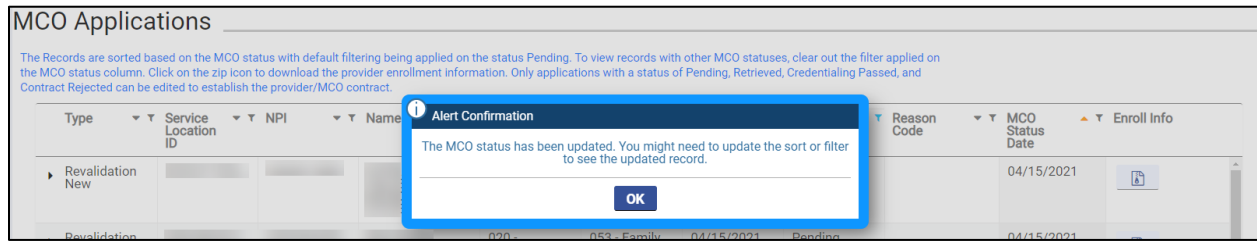
Figure 6-4 - Alert Confirmation

- o The **MCO Status** is automatically updated from **Pending** to **Retrieved** when the ZIP file is successfully downloaded.

- o The **MCO Status Date** is updated with the date on which the status changes.

- o The application is downloaded as a PDF to your computer.

3. To confirm which applications have been downloaded for review, click the **MCO Status** filter icon and select the **Retrieved** status, then click **FILTER**. Refer to Figure 6-5.
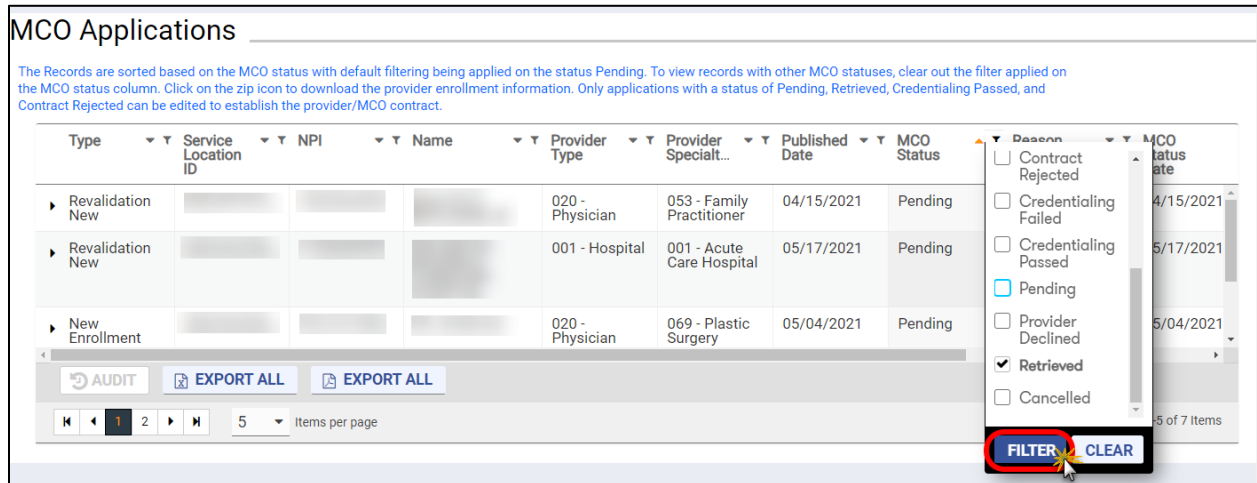
Figure 6-5 - Retrieved Status

4. The downloaded applications that are still pending appear in the grid with an **MCO Status** of **Retrieved** and an **MCO Status Date** of today. Refer to Figure 6-6.
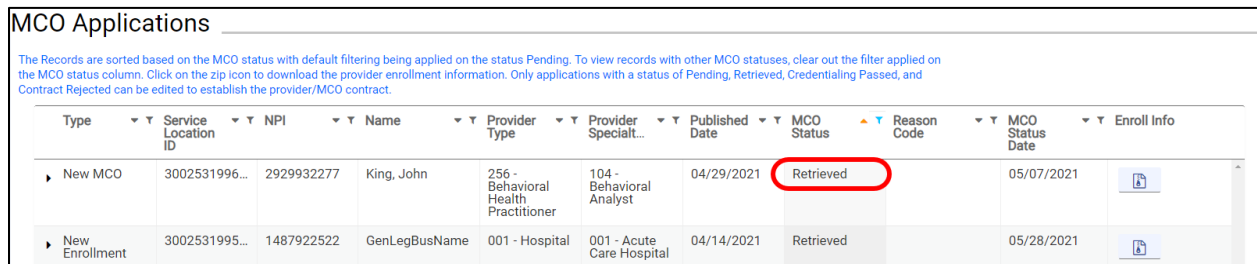
Figure 6-6 - Updated Status

6.2 Evaluate the Provider Application

Next, the MCO/ASO Clerk evaluates the Provider MCO participation request application and selects an MCO Status based on MCO/ASO criteria. This section is optional, the clerk can move directly to determining the contract status.

These statuses are optional and are based on the MCO/ASOs business rules.

Decisions for provider records are based on the evaluation performed by the MCO/ASO clerk. After the MCO/ASO clerk decides, users can update the MCO Status of the provider from **Retrieved** to one of the following:

- **Attachment Required:** The MCO/ASO needs additional documentation from the provider.

- **Credentialing Passed:** The credentialing information provided meets the MCO/ASOs criteria.

- **Credentialing Failed:** The provider record cannot be considered for a contract decision; the credentialing fails to meet the minimum MCO/ASO criteria.

- **Provider Declined:** The provider record cannot be considered for a contract decision, based on the provider deciding not to participate.

> ⚠️ If **Provider Declined** is selected, the record is no longer able to be modified and no contract will be created for the provider.

6.3 Update the MCO Status

To update the **MCO Status**, complete the following steps:

1. If **Retrieved** is not included in the filter, click the filter icon and select **Retrieved**.

2. Click **EDIT** for the record. Refer to Figure 6-7. The MCO Status column becomes editable and two buttons appear: **UPDATE** and **CANCEL**.

Figure 6-7 - Edit MCO Status

3. Select a status from the **MCO Status** dropdown list. Refer to Figure 6-8.

Figure 6-8 - Select MCO Status

4. Select a reason code from the dropdown list, then click **UPDATE**. Refer to Figure 6-9.

Figure 6-9 - Select MCO Reason Code

5. Click **OK** when the Alert Confirmation window appears. In the example below, the MCO Status now shows **Credentialing Passed** and **EDIT** is still an option. Refer to Figure 6-10.

If you do not see the application, update the MCO Status filter to include the selected status.

Figure 6-10 - Updated MCO Status

6.3.1 Attachment Required

If the MCO/ASO clerk determines additional documents are required from the provider, the clerk selects the **MCO Status** of **Attachment Required**. To request additional documents, complete the following steps:

1. If necessary, adjust the **MCO Status** filter to include a specific status, or all statuses.

2. Click **EDIT** for the record.

3. From the **MCO Status** column dropdown list, select **Attachment Required.**

4. Select a **Reason Code** from the dropdown list, then click **UPDATE**.

5. A **Documents Required From Provider** window appears.

6. In the **Attachment Detail** field, enter the required document details, then click **SUBMIT**. Refer to Figure 6-11.

Figure 6-11 - Attachment Required

7. Review the Alert Confirmation and click **OK** to accept. A message is sent to Provider Portal, alerting the Provider to the document request. Refer to Figure 6-12.
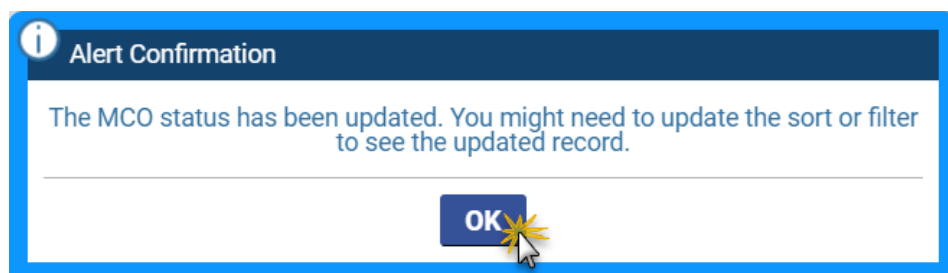
Figure 6-12 - Alert Confirmation

8. The **MCO Status** changes to **Attachment Added** once the provider uploads the documents.

9. A consolidated ZIP file is available under the **Add'l Info** column for the MCO/ASO clerk to review.

Figure 6-13 - Attachments Added

6.4 Revalidation

When a provider revalidates with the Virginia Medicaid Program and chooses to participate with an MCO, an application is generated by the system in the **MCO Applications** list as part of the revalidation process. Refer to Figure 6-14.

- If the provider is revalidating and has an existing MCO contract and requests enrollment with the same MCO, the application Type is **Revalidation Existing**.

- If the provider is revalidating and requests to participate with a new MCO, the new enrollment request with the MCO, the application Type is **Revalidation New.**

*Applications in a **Revalidation New** status are processed the same as a new enrollment application. Follow the steps in Section 6.1 - Download MCO Application to download and evaluate the provider application, request additional documentation if needed, and accept or reject the application.*

Figure 6-14 - Revalidation

Complete the following steps to evaluate the **Revalidation Existing** application:

1. Click the **ZIP Icon** under the **Enroll Info** column to download documents uploaded by the provider during enrollment.

2. Click **OK** when the Alert Confirmation message appears.

3. The MCO status is updated to **Retrieved** once the ZIP file is successfully downloaded. Refer to Figure 6-15.

Figure 6-15 - Retrieved Status

4. Verify downloaded documents, and then update the MCO status to **Acknowledged**. This is the final status of the application. Refer to Figure 6-16.

Figure 6-16 - Acknowledged Status

5. Select a **Reason Code** from the dropdown list and click **Update**. Refer to Figure 6-17.

Figure 6-17 - Select Reason Code

6. Click **YES** when the **Alert Confirmation** message displays, advising the clerk once **Acknowledge** is selected as the MCO Status the application is complete and the record can no longer be modified.

7. The MCO's confirmation is sent to Provider Portal for Provider review and Provider Management for PRSS Clerk review.

6.5 Determine Contract Status

Contract decisions are made on provider records based on the evaluation performed by the MCO Clerk. When the provider's credentialing fails or the provider is declined, the MCO ignores the respective provider record.

The two MCO Status options available are:

- **Contract Accepted:** Provider records are accurate and is approved for the MCO/ASO program within a specific network.

- **Contract Rejected:** There are reservations about accepting the contract on the provider record. The provider contract is not created with the respective MCO/ASO.

Note: Once a Contract Status is selected, the record can no longer be modified.

Ten (10) days after an application is accepted or rejected, it is removed from the MCO Enrollment Application list.

6.5.1 Contract Accepted

If the contract is accepted, complete the following steps to establish contract dates:

1. Click **EDIT** for the selected provider record.

2. Select **Contract Accepted** from the **MCO Status** dropdown, then click **UPDATE**. Refer to Figure 6-18.

Figure 6-18 - Contract Accepted

3. Select a reason from the **Reason Code** dropdown, then click **UPDATE**. Refer to Figure 6-19.

Figure 6-19 - Contract Approved Reason Code

4. Click **YES** when the **Alert Confirmation** message displays, advising the clerk that once **Contract Accepted** is selected as the **MCO Status** the application is complete and the record can no longer be modified.

5. The **Maintain Service Location Capacity and Restrictions** window appears. Refer to Figure 6-20.

Figure 6-20 - Maintain Service Location Capacity and Restrictions

6. Enter or select the provider's **Contract Start Date** and **Contract End Date** for this network, then click **SAVE**.

*Note: Use 12/ 31/ 9999 as the **Contract End Date** unless there is a reason to set the Provider up with temporary participation.*

7. A Confirmation Message appears. Click **CLOSE** to exit and return to the **MCO Applications** list. Refer to Figure 6-21.

Note: After confirmation, the Contract Status will update in Provider Management for PRSS Enrollment and and Management Clerks and Provider Portal for Providers and their delegates to view the MCO participation status.

Figure 6-21 - Confirmation Message

6.5.2 Contract Rejected

Note: Applications to participate in MCO programs may <u>not</u> be rejected through the PRN process. Use the following steps to reject an application through the MCO/ASO Portal.

If the contract is rejected, complete the following steps:

1. Click **EDIT** for the selected provider record.

2. Select **Contract Rejected** from the **MCO Status** dropdown.

3. Select a reason from the **Reason Code** dropdown, then click **UPDATE**. Refer to Figure 6-22.

Figure 6-22 - Contract Rejected

4. Click **YES** when the **Alert Confirmation** message displays, advising the clerk once **Contract Rejected** is selected as the MCO Status the application is complete and the record can no longer be modified.

5. The clerk is returned to the **MCO Applications** list and the MCO status is updated to **Contract Rejected.** Refer to Figure 6-23.

Note: After confirmation, the Contract Status will update in Provider Management for PRSS Enrollment and and Management Clerks and Provider Portal for Providers and their delegates to view the MCO participation status.

Figure 6-23 - Contract Rejected MCO Status

6.6 Audit

To view the audit trail for an MCO application:

1. Select a record from the MCO application grid and click **AUDIT**. Refer to Figure 6-24.

Figure 6-24 - Audit Application

2. The **Audit** window appears.

3. Click the **arrow** to expand the audit history results.

4. Click **X** to close the **Audit** window and return to the **MCO Applications** list. Refer to Figure 6-25.

Figure 6-25 - Audit History Results

7. My Account

The **My Account** section of the MCO/ASO Portal enables users to view their profile information and manage delegates.

7.1 Portal Profile Maintenance

In the Portal Profile Maintenance window an MCO/ASO can view their contact information. Users can view the contact's Name, Display Name, Phone Number, Current Email, and the Primary Language.

7.1.1 View Profile Information – MCO/ASO

To view the Account Profile, complete the following steps:

1. From the **Secure MCO/ASO Home** page, click **My Account**, then select **Portal Profile Maintenance**. Refer to Figure 7-1.
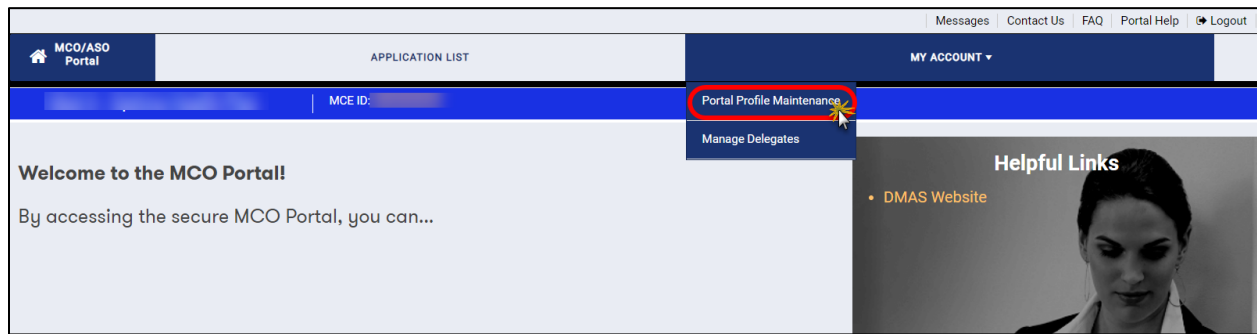

Figure 7-1 - Portal Profile Maintenance Menu

2. The **My Account Profile** window displays with pre-populated Contact Information. Refer to Figure 7-2.

Figure 7-2 - View My Account Profile

3. *Optional:* Update your MCO profile information.

    a. Click **Edit** to enable the fields.

    b. Enter updates, then click **SAVE**. Refer to Figure 7-3.

Figure 7-3 - Edit My Account Profile

7.1.2 View Profile Information – Delegate

To view the Delegate Account Profile, complete the following steps:

1. From the **Secure MCO/ASO Home** page, click **My Account**, then select **Portal Profile Maintenance**.

2. The **My Account Profile** window displays with pre-populated contact information. Refer to Figure 7-4.

*Note: A Registered Delegate must give the **Relationship Code** to additional MCOs to be added as a Delegate. If you do not see an expected MCO on your **Switch Organizations** window, contact the MCO with this **Relationship Code** and ask to be added as a Delegate.*

Figure 7-4 - View My Account Profile Delegate

7.2 Manage Delegates

The **Manage Delegates** feature enables users to establish and maintain delegates who can work in the MCO/ASO Portal on the primary user's behalf. Delegates can perform functions in the MCO/ASO Portal that are assigned by the user they represent. A MCO may have multiple Delegates such as administrative or clerical staff who perform different tasks.

There are two types of delegates:

- **Delegates** perform functions in the MCO/ASO Portal that are assigned by the user they represent.

- **Delegate Administrators (DA)** can access all functions available to the user they represent. This includes creating other delegates assigned to work on behalf of a user.

If a maximum number of delegates is assigned to a given organization, it is defined on the **Manage Delegates** page.
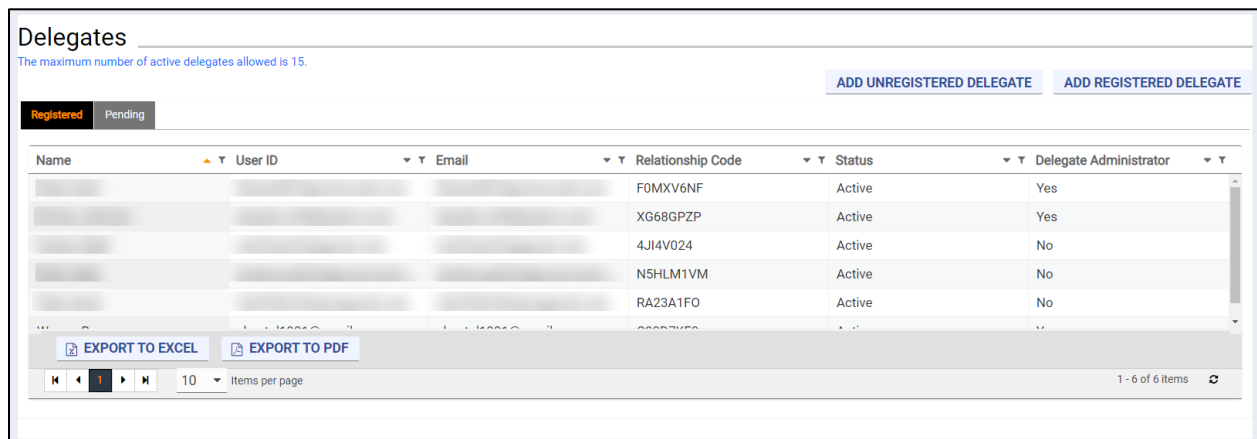
To manage delegates, complete the following steps:

1. From the **Secure Home** page, click **My Account** and select **Manage Delegates**. Refer to Figure 7-5.
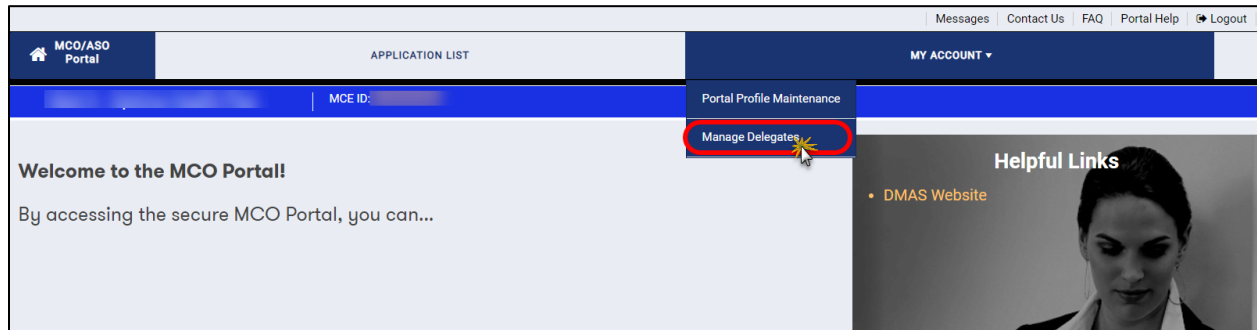
Figure 7-5 - Manage Delegates Menu

2. The **Delegates** page displays. The delegates currently assigned display on the **Registered** tab Refer to Figure 7-6.

Figure 7-6 - Delegates Page

*Note: The **Pending** tab is not applicable for Virginia MCOs.*

3. *Optional:* Click **EXPORT TO EXCEL** or **EXPORT TO PDF** to download the table results.

4. To view details of a delegate, double click a delegate's record. The **Assign Delegate** window appears with delegate details and currently assigned security functionality. Refer to Figure 7-7.

Figure 7-7 – View Delegate Details

The Active check box at the top of the window indicates whether the Delegate can work on your behalf. If the check box is not selected, then the Delegate will not have access to your account. This check box overrides any active security functions set for specific Service Locations.

7.2.1 Delegate Security Access

The MCO/ASO has the option of assigning the delegate all security functions, including the ability to add and maintain delegates for the MCO/ASO, or selecting specific functions the delegate is authorized to access.

Check **Delegate Administrator** to assign the delegate the ability to add and maintain other delegates for the MCO/ASO. The **Security Functions** section no longer appears as delegate administrators have access to all security functions for an MCO/ASO. Click **SAVE** if updates are complete. Refer to Figure 7-8.

Figure 7-8 - Delegate Administrator Security Role

If the delegate is not an administrator, assign security functions to the selected delegate by highlighting an **Available Function**, then click ▶ to move the function to the **Selected Functions** box. Click **SAVE** to save the delegate information. The user must select at least one security function for active delegates. Refer to Figure 7-9.

Figure 7-9 - Select Security Functions

- Click ⏩ to move all **Available Functions** to the **Selected Functions** box to assign security functions to the selected delegate.

- Remove security functions of a delegate by highlighting a **Selected Function**, and then clicking ◀ to move the function to the **Available Functions** box.

- Click ◀◀ to move all **Selected Functions** to the **Available Functions** box to remove security functions of a delegate.

*Note: To learn more about security rights associated with a specific function, move your cursor over the function name in the **Available Functions** or **Selected Functions** lists. Refer to Figure 7-11.*

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

Available Functions | | Selected Functions
Spenddown Claims Submission Inquiry
Eligibility
Spenddown - Inquiry
Application List - View
Application List - View/Update
Resources
Spenddown - Inquiry/Update

Grants the ability to view the application list in the managed care organization portal

Figure 7-10 – Security Function Note

7.2.2 Add Delegate

The process to add a Delegate varies slightly depending on whether the person is already registered on the MCO Portal. Take note of these points:

- Registered Delegates already have MCO Portal credentials while Unregistered Delegates do not.

- Registered Delegates must provide you their **Last Name** and **Relationship Code** so that permission to access the MCO are added to the Delegate's existing account. Refer to Section **7.1.2 – View Profile Information – Delegate** to locate the Relationship Code.

- Unregistered Delegates will need to complete registration <u>after</u> you add them and before accessing your account. Refer to Section **4.1- MCO Portal Registration – Delegates**.

7.2.2.1 Add Registered Delegate

To add a Registered Delegate, complete the following steps:

1. From the Delegates page, click **ADD REGISTERED DELEGATE**.

Delegates
The maximum number of active delegates allowed is 15.

ADD UNREGISTERED DELEGATE   ADD REGISTERED DELEGATE

Registered   Pending

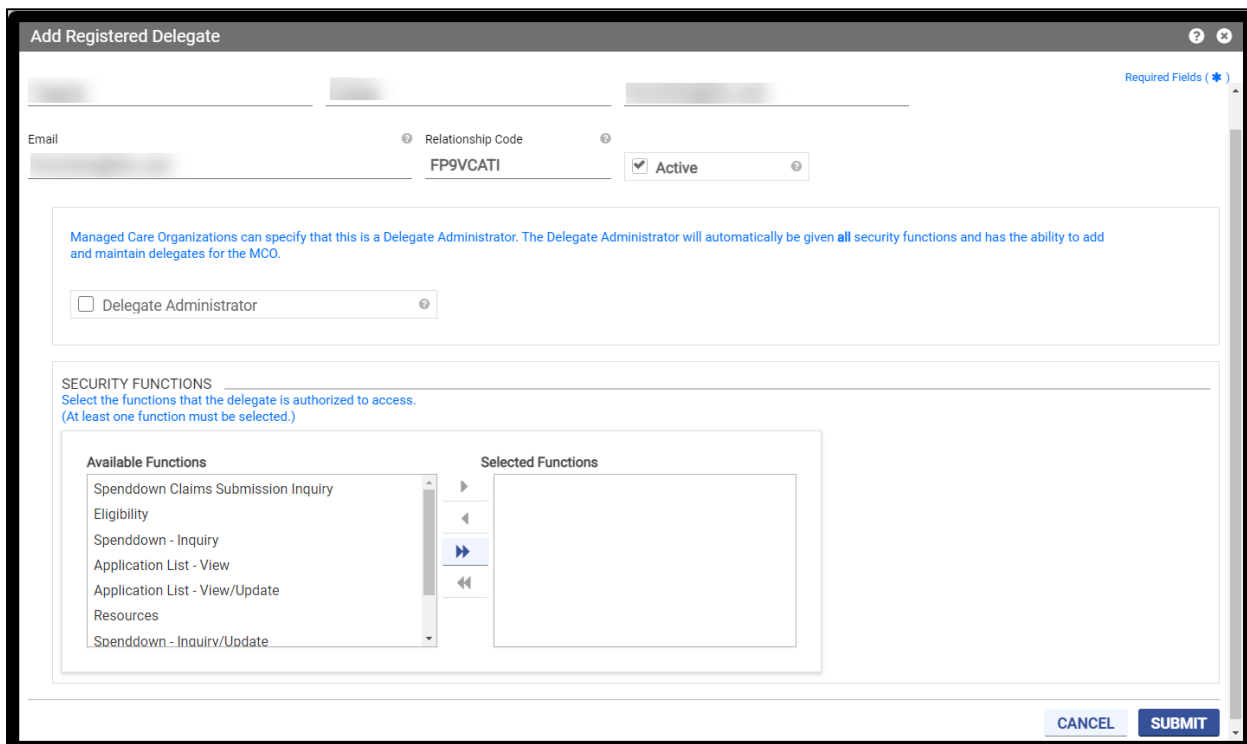**Figure 7-11 - Add Registered Delegate Button**

2. The **Add Registered Delegate** window appears. Enter the supplied Delegate **Last Name** and **Relationship Code**, then click **CONTINUE**. Refer to Figure 7-12.

Figure 7-12 - Add Registered Delegate

3. When the **Last name** and **Relationship Code** are validated by the system, the **Add Registered Delegate** window displays the validated Delegate's information. Refer to Figure 7-13.

Figure 7-13 - Validated Delegate Information

4. Select the appropriate level of security.

   a. Check **Delegate Administrator** to assign the delegate the ability to add and maintain other delegates for the MCO/ASO, if applicable. The **Security Functions** section no longer appears as a Delegate Administrator will have access to all security functions for an MCO/ASO. Click **SUBMIT**. Refer to Figure 7-14.

Figure 7-14 - Delegate Administrator Selection

b. If the delegate is not an administrator, assign security functions to the new delegate by highlighting an **Available Function**, then click ▶ to move the function to the **Selected Functions** box. Refer to Figure 7-15.

Note:

- *Available Functions list (left) includes those that the Delegate does not currently have assigned.*

- *Selected Functions list (right) includes those that the Delegate will have assigned. When adding a Delegate, this list is initially blank. At least one security function must be added to continue.*

Figure 7-15 - Security Functions

o Click ⏩ to move all **Available Functions** to the **Selected Functions** box to assign security functions to the selected delegate.

o Remove security functions of a delegate by highlighting a **Selected Function**, and then clicking ◀ to move the function to the **Available Functions** box.

o Click ⏪ to move all **Selected Functions** to the **Available Functions** box to remove security functions of a delegate.

    o   Click **Submit** to save the delegate information. The user must select at least one security function for active delegates.

To learn more about security rights associated with a specific function, hover over the function name in the Available Function or Selected Function box. Refer to Figure 7-16.

Figure 7-16 - Function Hover

5.   A confirmation displays and the new delegate appears in the **Registered** table. Refer to Figure 7-17.

Figure 7-17 - Added Registered Delegate

7.2.2.2 Add Unregistered Delegate

This feature enables the user to add a delegate who is not currently associated with you and does not currently have an account with the system. As with registered delegates, a new delegate must be assigned one or more security functions when active.

To add an unregistered delegate, complete the following steps:

1. From the **Delegates** page, click **ADD UNREGISTERED DELEGATE**. Refer to Figure 7-18.

Figure 7-18 - Add Unregistered Delegate link

2. The **Add Unregistered Delegate** window appears.

   a. Complete the Delegate's profile information.

   b. If the delegate is not an administrator, assign security functions to the new delegate by highlighting an **Available Function**, then click ▶ to move the function to the **Selected Functions** box.

   c. Click **SUBMIT**. A confirmation message appears.

Figure 7-19 - Add Unregistered Delegate

3. The Delegate receives the emails to complete MCO/ASO Portal registration. The Delegate will be able to access the MCO/ASO's account from **Switch Organization** as soon as registration is complete. Refer to Section **4.1 - MCO Portal Registration – Delegates**.

Appendix A.   Acronyms

Acronym	Definition
ARRA	American Recovery and Reinvestment Act
ASO	Administrative Services Organization
DA	Delegate Administrators
FAQ	Frequently Asked Questions
HIPAA	Health Information Portability and Accountability Act
HSMMS	Healthcare Solutions Modular Management System
ID	Identification
MCO	Managed Care Organization
MES	Medical Enterprise System
NPI	National Provider Identifier
PRSS	Provider Services Solution
UI	User Interface

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