

Managing Delegates as a Delegate Administrator

Delegate Administrators can now see all delegates that are registered at the Base ID (Tax ID level), on the Registered tab of the Delegate screen.

- Log in as a Delegate Administrator and navigate to **Maintenance**, then to the **Manage Delegate** screen.
 - The Service Location field defaults to “select a value” on the Delegates screen (Figure 1, below).
 - When the Service Location field is set to “select a value”, all registered delegates at the Base ID display on the Registered tab, under the Delegate Information section. When no service location is selected, this section will only display four columns of information.
 - When selecting a location on the Service Location dropdown of the Delegates screen, then the Registered tab displays only the registered delegates for the service location selected. In this case, six columns of information are displayed with two columns being service location specific (Figure 2, below).

Virginia Department of Medical Assistance Services
Provider Services

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DIGITRACE CARE SERVICES INC | NPI 1275929564

Delegates

SERVICE LOCATION INFORMATION

NPI: 1275929564 | Base ID: 3002756527 | Name: DIGITRACE CARE SERVICES INC

Service Location: select a value...

DELEGATE INFORMATION

Use status column filters to include inactive delegates.

ADD UNREGISTERED DELEGATE | ADD REGISTERED DELEGATE

Registered | Pending

Name	Email Address	Relationship Code	Delegate Status
Delegate Three, Delegate Three	VASecondTest02@gmail.com	2LOUVDE7	Active
Doe, Jon	vasitdelgtest@gmail.com	G2AGBB81	Active
Doe, Libby	LibbyDoe1234@gmail.com	Z1CLIC90	Active
Glentz, Jim	Jim.Glentz@dx.com	HRBXWZD0	Active
Johnson, Don	VASITTESTDelegate@gmail.com	A2BTPGGX	Active

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Figure 1: Delegates Screen - Service Location Drop-Down

Continued Next Page...



Virginia Department of Medical Assistance Services
Medicaid Enterprise System (MES)
PRSS Module
Managing Delegates as a Delegate Administrator

Virginia Department of Medical Assistance Services
Provider Services

Delegate For Provider DIGITRACE CARE SERVICES INC | Location ID / NPI 30027565270011 / 1336368844 | Service Location DIGITRACE CARE SERVICES INC - 7500 GREENWAY CENTER DR, GREENBELT, MD 20770-0000 | Go to Switch Provider

Delegates

SERVICE LOCATION INFORMATION

NPI: 3002756527 | Base ID: 3002756527 | Name: DIGITRACE CARE SERVICES INC

Service Location: 30027565270001 - DIGITRACE CARE SERVICES, INC. - 46440 BENEDICT DR STE 103, STERLING, VA 20164-6602

DELEGATE INFORMATION
Use status column filters to include inactive delegates.

[ADD UNREGISTERED DELEGATE](#) [ADD REGISTERED DELEGATE](#)

Registered Pending

Name	Email Address	Relationship Code	Delegate Status	Service Location Association Status	Delegate Administrator
Doe, Libby	LibbyDoe1234@gmail.com	Z1CLIC90	Active	Active	Yes

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Figure 2: Delegates Screen - Registered Delegates Only Displayed

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Delegate Administrators (DA's) can now assign additional Service Locations to delegates that are registered at the Base ID (Tax ID level)

- Log in as a Delegate Administrator and navigate to **Maintenance**, then to the **Manage Delegate** screen.
 - Locate a registered delegate by either selecting the location from the Service Location dropdown that the delegate is currently assigned to or to see all delegates registered at the Base ID then set the dropdown to 'select a value' (Figure 3, below).
 - Double click the delegate under the Registered tab. Note: If nothing happens when you double click the delegate's name, you will need to clear your browser cache in order for recent application changes to take effect. Perform the necessary steps to clear browser cache depending on browser version. Completely close and exit the browser. Then log back into MES and try again.
 - Select the third radio button 'Select Service Locations/Security Functions' under the Add Options section, and a grid displays a list of Service Locations that the DA has access to. Note: If you are a delegate administrator and you select either of the first two radio buttons that say, "Assign All Service Locations", the delegate will only be assigned to the one service location that was selected on the Switch Provider page. If you are a Primary Account Holder and you select one of the first two radio buttons, the delegate will be assigned to all locations under the Base ID.
 - Check the 'Active' box for one service location, and then select the Security Functions from the Available Functions box for that one service location.
 - Return to the grid that displays the list of Service Locations that the DA has access to, and repeat, until all desired service locations and security functions have been selected for the delegate.
 - Click Submit.

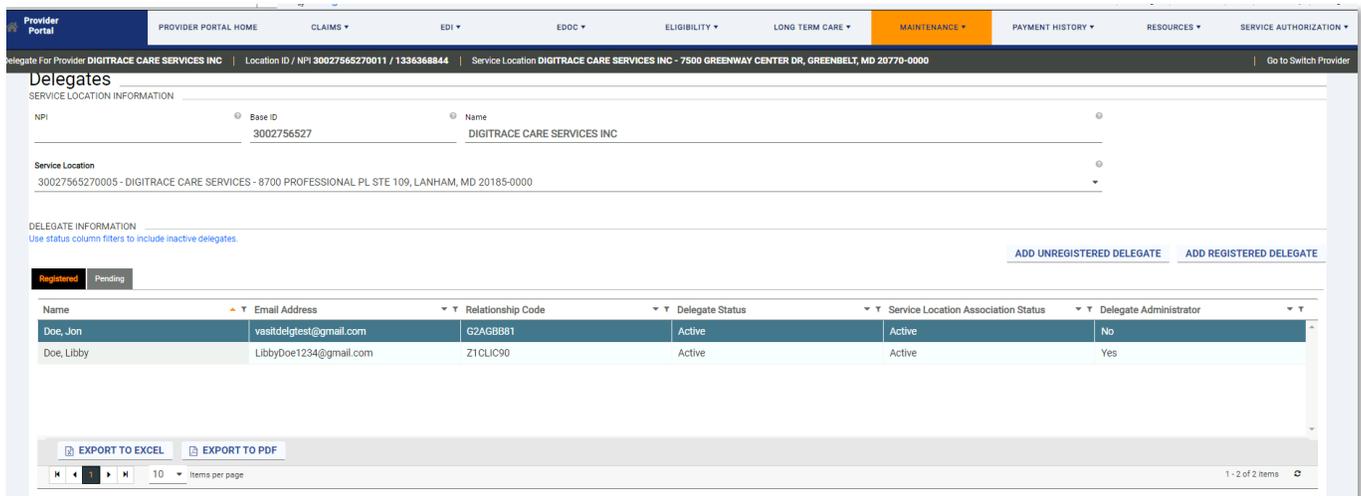


Figure 3: Delegates Screen

Assign Delegate ⌵ ⌵

First Name

Last Name

User ID

Required Fields (4)

Email

Relationship Code

Active

ADD OPTIONS

Assign All Service Locations / Security Functions
 Assign All Service Locations / Assign Selected Security Functions
 Select Service Locations / Security Functions

Active	Service Location	Security Functions
<input checked="" type="checkbox"/>	30027565270001 - DIGITRACE CARE SERVICES, INC. - 46440 BENEDICT DR STE 103, STERLING, VA 20154 6602	
<input type="checkbox"/>	30027565270002 - DIGITRACE CARE SERVICES INC - 2052 JEFFERSON DAVIS HWY STE 109, STAFFORD, VA 22554 7286	
<input type="checkbox"/>	30027565270003 - DIGITRACE CARE SERVICES INC - 13662 OFFICE PL, STE 104, WOODBRIDGE, VA 22192 4217	
<input checked="" type="checkbox"/>	30027565270005 - DIGITRACE CARE SERVICES - 8700 PROFESSIONAL PL STE 100, LANHAM, MD 21144 4000	Maintenance - Manage My Information

SECURITY FUNCTIONS

Select the functions that the delegate is authorized to access.
 At least one function must be selected for active service locations.

Available Functions

ARS
Claims Entry

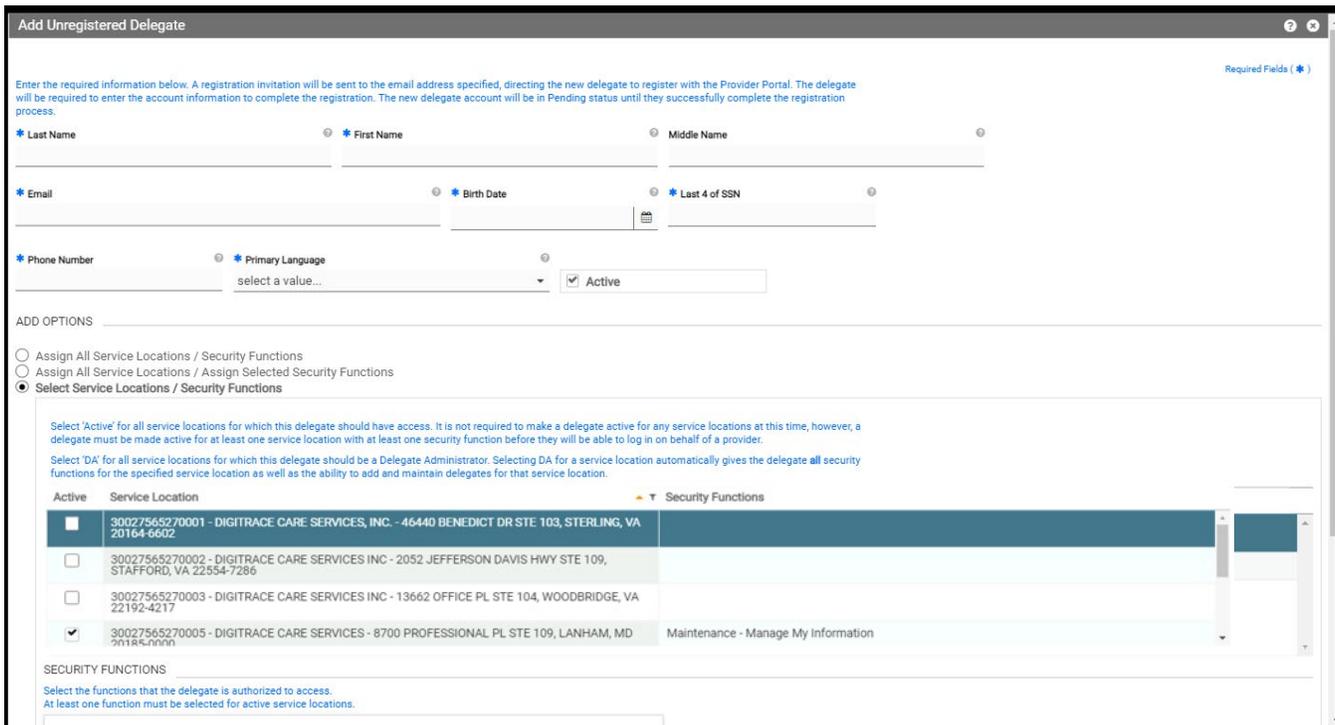
Selected Functions

Figure 4: Assign Delegate Screen

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Delegate Administrators (DA's) can now assign multiple Service Locations for unregistered delegates

- Log in as a Delegate Administrator and navigate to **Maintenance**, then to the **Manage Delegate** screen.
 - Click the Add Unregistered Delegate button
 - Complete the delegate information (name, email, etc.)
 - Select the third radio button 'Select Service Locations/Security Functions' under the Add Options section, and a grid displays a list of Service Locations that the DA has access to. Note: If you are a delegate administrator and you select either of the first two radio buttons that say, "Assign All Service Locations", the delegate will only be assigned to the one service location that was selected on the Switch Provider page. If you are a Primary Account Holder and you select one of the first two radio buttons, the delegate will be assigned to all locations under the Base ID.
 - Check the 'Active' box for one service location, then select the Security Functions from the Available Functions box.
 - Return to the grid that displays the list of Service Locations that the DA has access to, and repeat, until all desired service locations and security functions have been selected for that delegate.
 - Click Submit.



Add Unregistered Delegate

Enter the required information below. A registration invitation will be sent to the email address specified, directing the new delegate to register with the Provider Portal. The delegate will be required to enter the account information to complete the registration. The new delegate account will be in Pending status until they successfully complete the registration process.

Required Fields (★)

* Last Name * First Name Middle Name

* Email * Birth Date * Last 4 of SSN

* Phone Number * Primary Language Active

ADD OPTIONS

Assign All Service Locations / Security Functions
 Assign All Service Locations / Assign Selected Security Functions
 Select Service Locations / Security Functions

Select 'Active' for all service locations for which this delegate should have access. It is not required to make a delegate active for any service locations at this time, however, a delegate must be made active for at least one service location with at least one security function before they will be able to log in on behalf of a provider.

Select 'DA' for all service locations for which this delegate should be a Delegate Administrator. Selecting DA for a service location automatically gives the delegate all security functions for the specified service location as well as the ability to add and maintain delegates for that service location.

Active	Service Location	Security Functions
<input checked="" type="checkbox"/>	30027565270001 - DIGITRACE CARE SERVICES, INC. - 46440 BENEDICT DR STE 103, STERLING, VA 20164-6602	
<input type="checkbox"/>	30027565270002 - DIGITRACE CARE SERVICES INC - 2052 JEFFERSON DAVIS HWY STE 109, STAFFORD, VA 22554-7286	
<input type="checkbox"/>	30027565270003 - DIGITRACE CARE SERVICES INC - 13662 OFFICE PL STE 104, WOODBRIDGE, VA 22192-4217	
<input checked="" type="checkbox"/>	30027565270005 - DIGITRACE CARE SERVICES - 8700 PROFESSIONAL PL STE 109, LANHAM, MD 20156-7099	Maintenance - Manage My Information

SECURITY FUNCTIONS

Select the functions that the delegate is authorized to access.
 At least one function must be selected for active service locations.

Figure 5: Add Unregistered Delegate Screen

Delegate Administrators (DA's) can now assign one or multiple Service Locations to already existing registered delegates, where the delegate does not have a relationship with the Base ID (Tax ID level) yet.

- Log in as a Delegate Administrator and navigate to **Maintenance**, then to the **Manage Delegate** screen.
- Click Add Registered Delegate. Note: This option is only used for existing delegates that have not been assigned to any locations under this provider Base ID (Tax ID level).
- Complete the last name, relationship code and click continue.
- On the next Add Registered Delegate window, select the third radio button 'Select Service Locations/Security Functions' under the Add Options section, and a grid displays a list of Service Locations that the DA has access to. Note: If you are a delegate administrator and you select either of the first two radio buttons that say, "Assign All Service Locations", the delegate will only be assigned to the one service location that was selected on the Switch Provider page. If you are a Primary Account Holder and you select one of the first two radio buttons, the delegate will be assigned to all locations under the Base ID.
- Check the 'Active' box for one service location, then select the Security Functions from the Available Functions box.
- Return to the grid that displays the list of Service Locations that the DA has access to, and repeat, until all desired service locations and security functions have been selected.
- Click Submit.

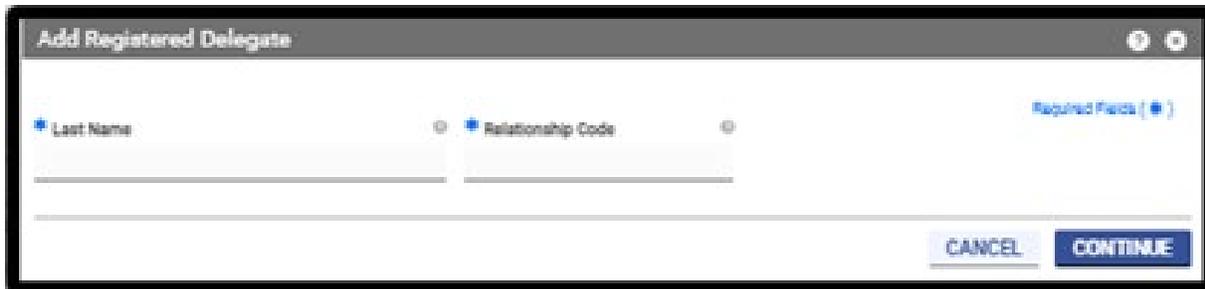


Figure 6: Add Registered Delegate Window

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Enter the required information below. A registration invitation will be sent to the email address specified, directing the new delegate to register with the Provider Portal. The delegate will be required to enter the account information to complete the registration. The new delegate account will be in Pending status until they successfully complete the registration process. Required Fields (*)

* Last Name * First Name Middle Name

* Email * Birth Date * Last 4 of SSN

* Phone Number * Primary Language Active

ADD OPTIONS

Assign All Service Locations / Security Functions
 Assign All Service Locations / Assign Selected Security Functions
 Select Service Locations / Security Functions

Select 'Active' for all service locations for which this delegate should have access. It is not required to make a delegate active for any service locations at this time, however, a delegate must be made active for at least one service location with at least one security function before they will be able to log in on behalf of a provider.
Select 'DA' for all service locations for which this delegate should be a Delegate Administrator. Selecting DA for a service location automatically gives the delegate all security functions for the specified service location as well as the ability to add and maintain delegates for that service location.

Active	Service Location	Security Functions
<input type="checkbox"/>	30027565270001 - DIGITRACE CARE SERVICES, INC. - 46440 BENEDICT DR STE 103, STERLING, VA 20164-6602	
<input type="checkbox"/>	30027565270002 - DIGITRACE CARE SERVICES INC - 2052 JEFFERSON DAVIS HWY STE 109, STAFFORD, VA 22554-7286	
<input type="checkbox"/>	30027565270003 - DIGITRACE CARE SERVICES INC - 13662 OFFICE PL STE 104, WOODBRIDGE, VA 22192-4217	
<input checked="" type="checkbox"/>	30027565270005 - DIGITRACE CARE SERVICES - 8700 PROFESSIONAL PL STE 109, LANHAM, MD 20185-0000	Maintenance - Manage My Information

SECURITY FUNCTIONS
Select the functions that the delegate is authorized to access.
At least one function must be selected for active service locations.

Figure 7: Add Registered Delegate Screen