



Virginia MCO/ASO Portal User Guide

Medicaid Management Solutions

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Note: This user manual 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 Rule¹, and the American Recovery and Reinvestment Act (ARRA) of 2009 requires that covered entities protect the privacy and security of individually identifiable health information.

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

Revision History

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1.0	10/2021	A. Nunan	Final Draft
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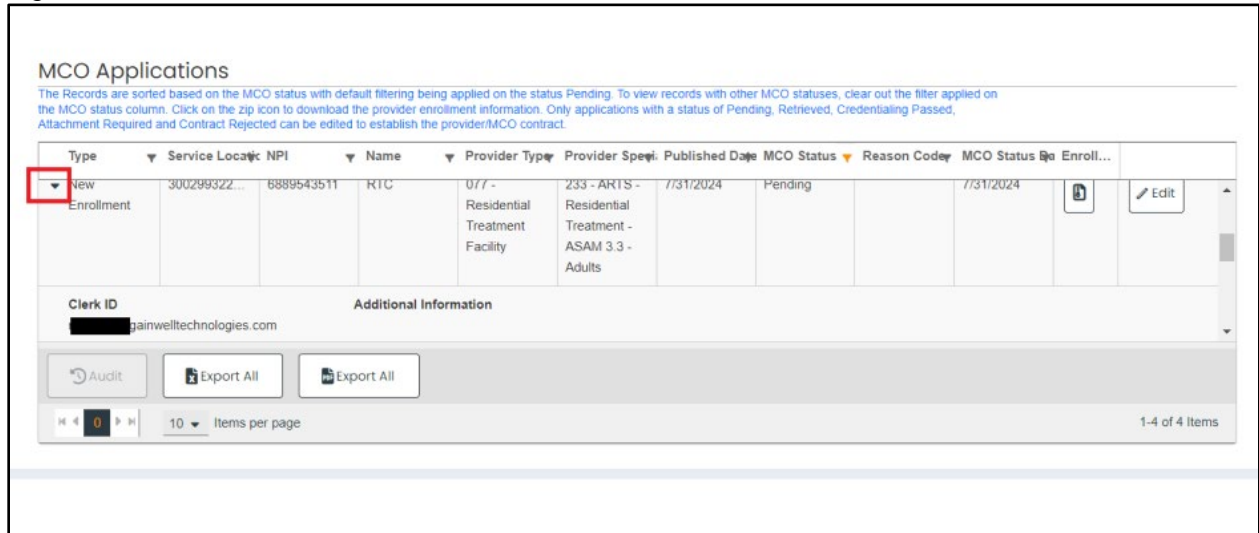
Contents

1	Introduction	1
2	Information You Will Need.....	3
3	System Requirements.....	4
4	Medicaid Enterprise System (MES) Secure MCO Portal Access.....	5
4.1	MCO Portal Registration – Delegates	5
4.2	MCO Portal Log in	9
4.3	Switch Organization - Delegate	12
5	MES Secure MCO/ASO Portal Navigation.....	14
5.1	At-a-Glance Bar.....	14
5.2	Navigation.....	17
5.3	Interactive Features	18
6	Application List.....	19
6.1	Download MCO Application.....	21
6.2	Update the MCO Status	23
6.2.1	Attachment Required	25
6.3	Verify Credentialing.....	27
6.4	Determine Contract Status	27
6.4.1	Contract Accepted.....	28
6.4.2	Contract Rejected	30
6.5	Revalidation	32
6.6	Audit.....	34
7	My Account.....	36
7.1	Portal Profile Maintenance	36
7.1.1	View Profile Information – MCO/ASO.....	36
7.1.2	View Profile Information – Delegate	37
7.2	Manage Delegates	38
7.2.1	Delegate Security Access	41
7.2.1.1	Assign All Security Functions.....	41
7.2.1.2	Assign Selected Security Functions	41
7.2.2	Add Delegate	43
7.2.2.1	Add Registered Delegate	43
7.2.2.2	Add Unregistered Delegate.....	47
7.2.3	Activate/Inactivate Delegate	49
Appendix A.	Acronyms	51

List of Figures

Figure 1-1: User Guide Icons	1
Figure 1-2: MCO/ASO System Organization	2
Figure 4-1: MCO/ASO Portal Access Email 1	6
Figure 4-2: MCO/ASO Portal Access Email 2	6
Figure 4-3: MES Secure Login Page	7
Figure 4-4: Complete Registration	8
Figure 4-5: MES Landing Page.....	9
Figure 4-6: MES Secure Login Window	10
Figure 4-7: MES Landing Page.....	11
Figure 4-8: Provider Management Expand Icon	11
Figure 4-9: PRSS Portal Hyperlink.....	12
Figure 4-10: MCO/ASO Portal Secure Home Page.....	12
Figure 4-11: Manage/Switch Organization Delegates	13
Figure 4-12: Delegate Information Identifier Bar	13
Figure 4-13: Switch Organization.....	14
Figure 5-1: At a Glance	14
Figure 5-2: At a Glance Bar - Messages	15
Figure 5-3: At a Glance Bar - Contact Us.....	16
Figure 5-5: At a Glance Bar - MCO Portal Help	17
Figure 5-6: Navigation Menu.....	17
Figure 6-1: Application List	19

Figure 6-2: View



Additional Fields20

Figure 6-3: Download Enrollment Information.....22

Figure 6-4: Alert Confirmation.....22

Figure 6-5: Retrieved Status23

Figure 6-6: Updated Status.....23

Figure 6-7: Edit MCO Status24

Figure 6-8: Select MCO Status24

Figure 6-9: Select MCO Reason Code24

Figure 6-10: Updated MCO Status25

Figure 6-11: Attachment Required.....26

Figure 6-12: Alert Confirmation26

Figure 6-13: Attachments Added.....26

Figure 6-14: Contract Accepted28

Figure 6-15: Contract Approved Reason Code28

Figure 6-16: Maintain Service Location Capacity and Restrictions.....29

Figure 6-17: Confirmation Message29

Figure 6-18: Contract Rejected30

Figure 6-19: Contract Rejected MCO Status31

Figure 6-20: Revalidation.....32

Figure 6-21: Retrieved Status.....33

Figure 6-22: Acknowledged Status.....33

Figure 6-23: Select Reason Code.....34

Figure 6-24: Audit Application.....34

Figure 6-25: Audit History Results35

Figure 7-1: Portal Profile Maintenance Menu36

Figure 7-2: View My Account Profile37

Figure 7-3: Edit My Account Profile37

Figure 7-4: View My Account Profile Delegate38

Figure 7-5: Manage Delegates Menu.....39

Figure 7-6: Delegates Page39

Figure 7-7: View Delegate Details40

Figure 7-8: Delegate Administrator Security Role.....41

Figure 7-9: Select Security Functions42

Figure 7-10: Security Function Note42

Figure 7-11: Add Registered Delegate Button.....43

Figure 7-12: Add Registered Delegate.....43

Figure 7-13: Validated Delegate Information.....44

Figure 7-14: Delegate Administrator Selection.....45

Figure 7-15: Security Functions46

Figure 7-16: Function Hover.....46

Figure 7-17: Added Registered Delegate.....47

Figure 7-18: Add Unregistered Delegate Link47

Figure 7-19: Add Unregistered Delegate48

Figure 7-20: Manage Delegates Menu49

Figure 7-21: Delegates Page49

Figure 7-22: Change Delegate Status.....50

List of Tables

Table 5-1: At a Glance Bar.....	14
Table 5-2: Primary Features.....	17
Table 5-3: Interactive Features.....	18
Table 6-1: Elements of the MCO Applications Panel.....	20




1 Introduction

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

Providers may request participation at enrollment, during revalidation, or through their provider maintenance features.

Throughout this guide, you will see various notes to enhance your use of the MCO Portal. Refer to Figure 4-1.

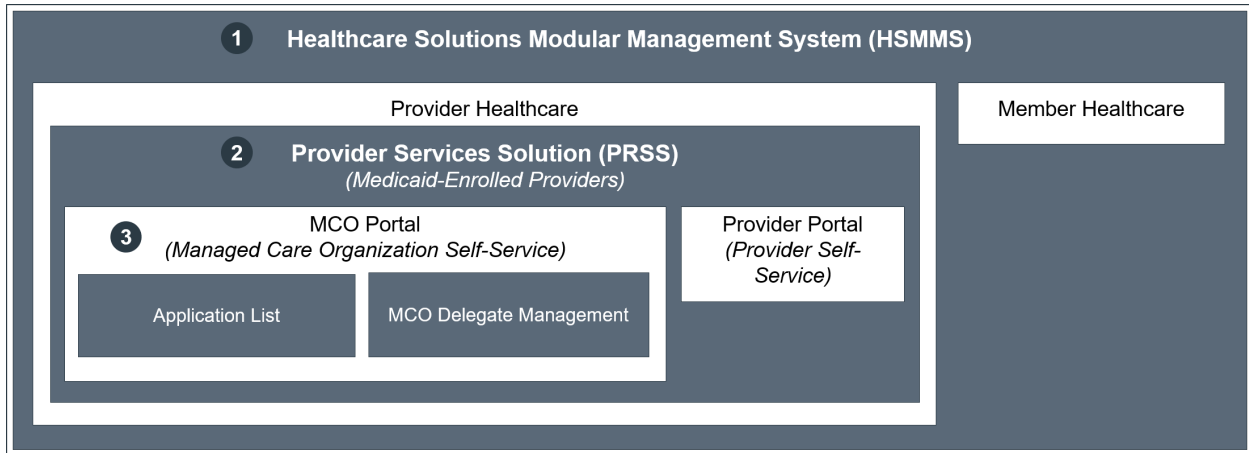
Figure 1-1: User Guide Icons

 <p>Indicates extra tips and useful explanations.</p>	 <p>Indicates more resources are in another location such as another document or a website.</p>	 <p>Indicates a critical step that you must take (or not take) to avoid errors.</p>
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Refer to Figure 1-1 for an overview of how the systems relevant to this guide are organized:

- Healthcare Solutions Modular Management System (HSMMS)** is a collaboration of modules that 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.
- 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.
- 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 decision-making accuracy 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 behalf of primary users.

Figure 1-2: 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 will need to have basic knowledge of MCOs/ASOs and 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 - Medicaid 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 Medicaid 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 an 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 accessed through the MES landing page. 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.

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

Hello [REDACTED],

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: [REDACTED]

URL: [REDACTED]

Note: The one time passcode to login to MES ICAM would be sent in a separate 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 4-2: MCO/ASO Portal Access Email 2

Hello [REDACTED],

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: [REDACTED]

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

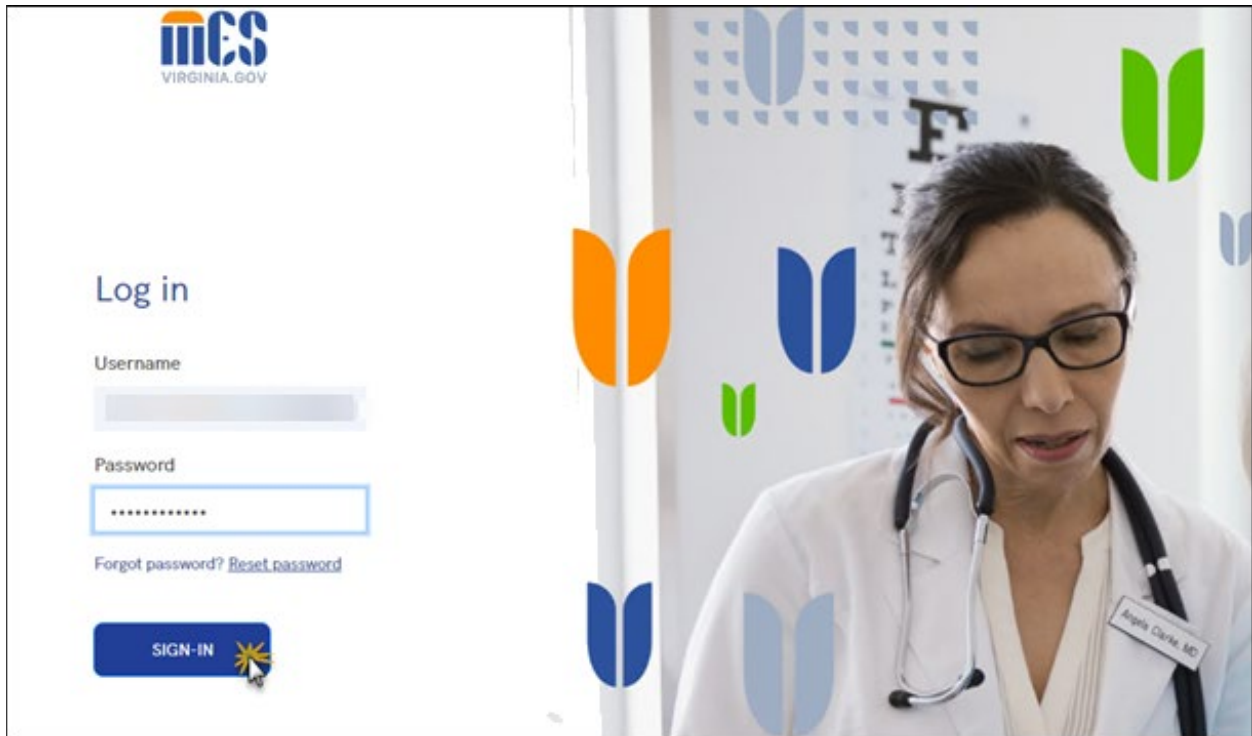
This is an auto generated email from DMAS Medicaid Enterprise System, please do not reply to this message. This message is for the designated recipient only and may contain privileged information.



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

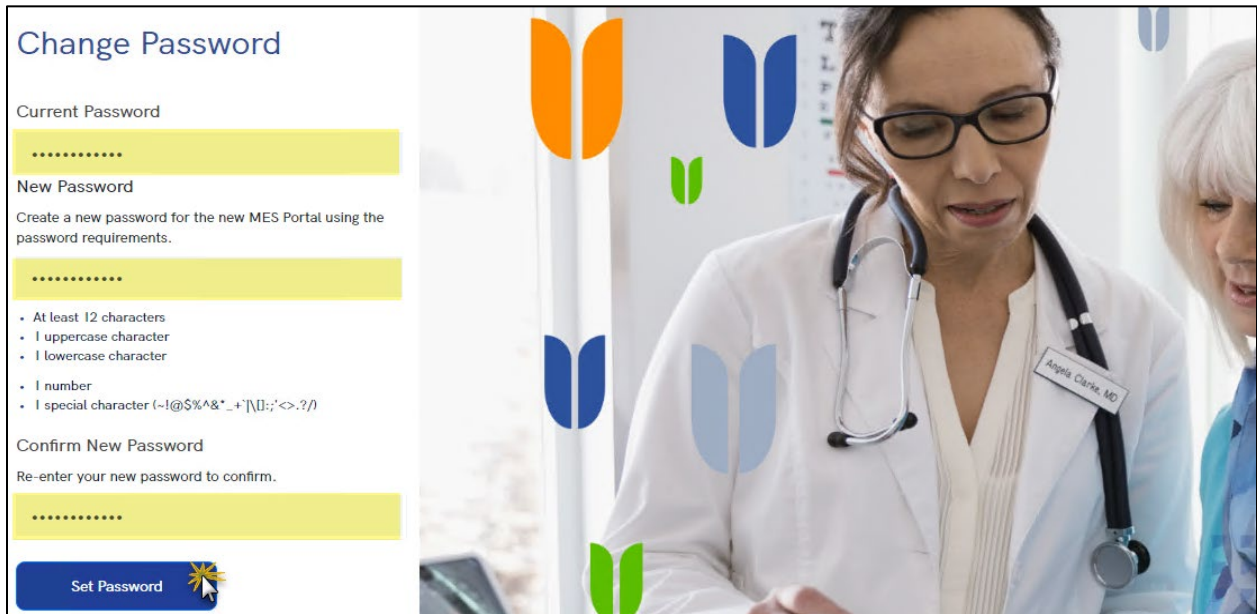
Figure 4-3: MES Secure Login Page



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

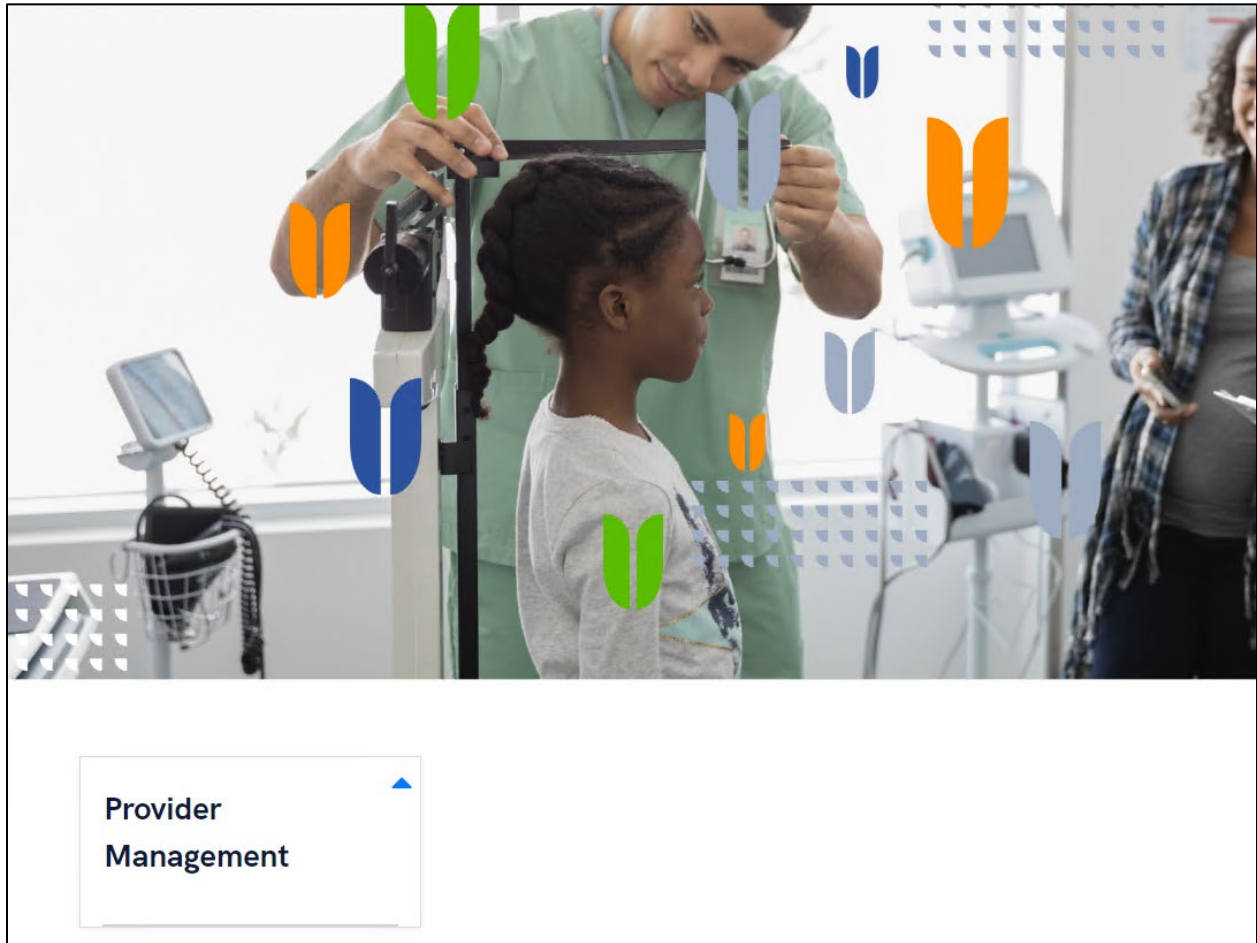
5. Click **Set Password**. Refer to Figure 4-4.

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/ASO 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.

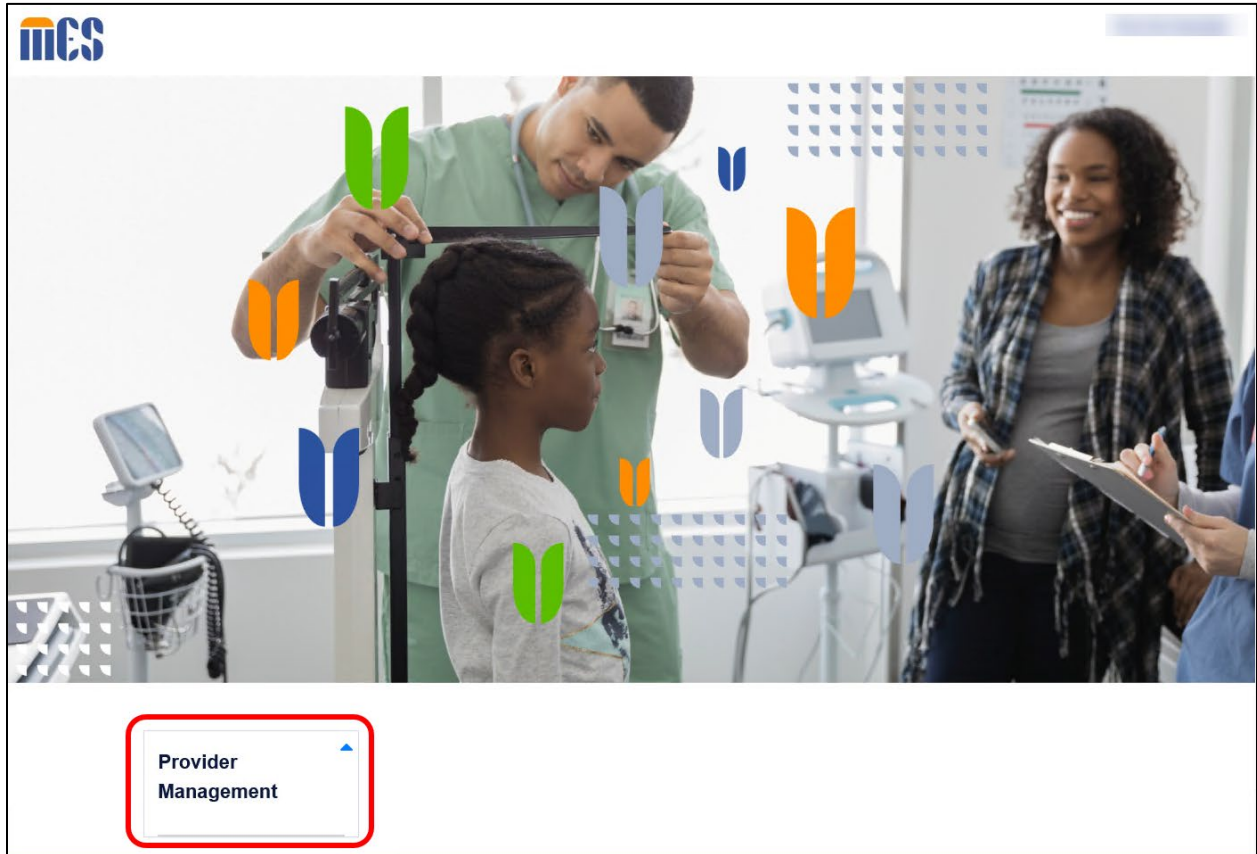
Figure 4-6: MES Secure Login Window



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

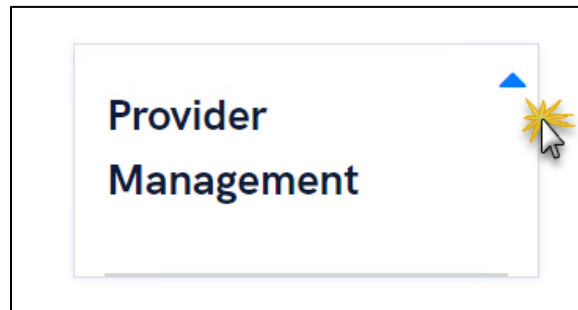
3. Once you are signed into your account, the **MES Landing** page appears with the applications available to you. Refer to Figure 4-7.

Figure 4-7: MES Landing Page



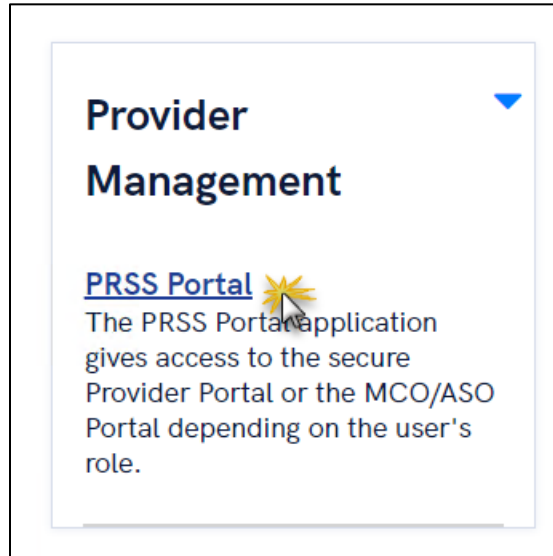
4. Click the expand icon for the **Provider Management** application. Refer to Figure 4-8.

Figure 4-8: Provider Management Expand Icon



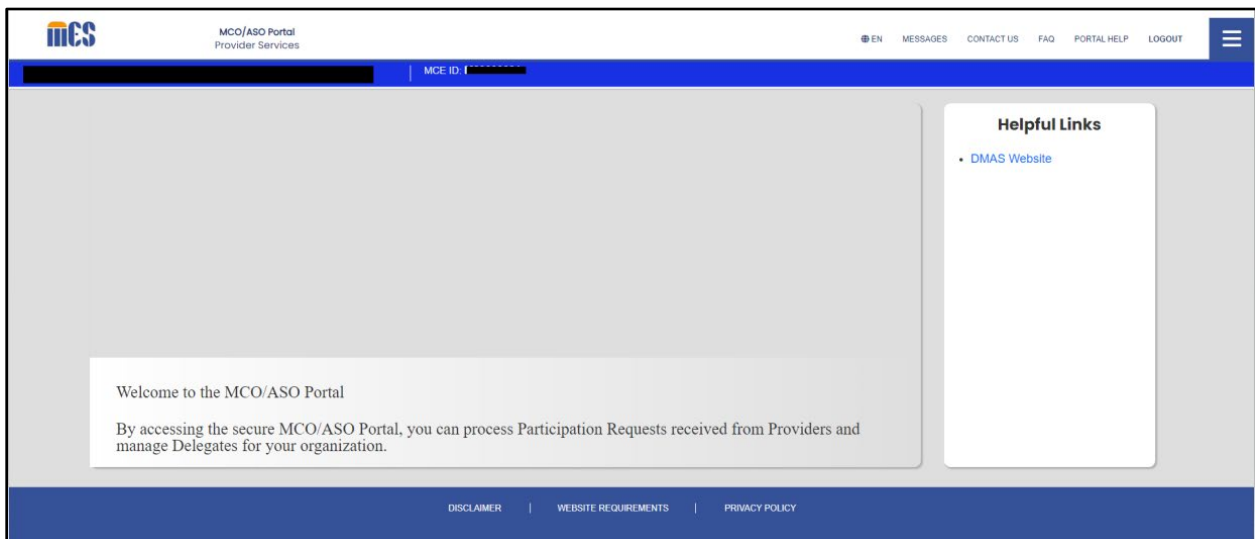
5. Click the **PRSS Portal** hyperlink to access the **MCO/ASO Portal**. Refer to Figure 4-9.

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

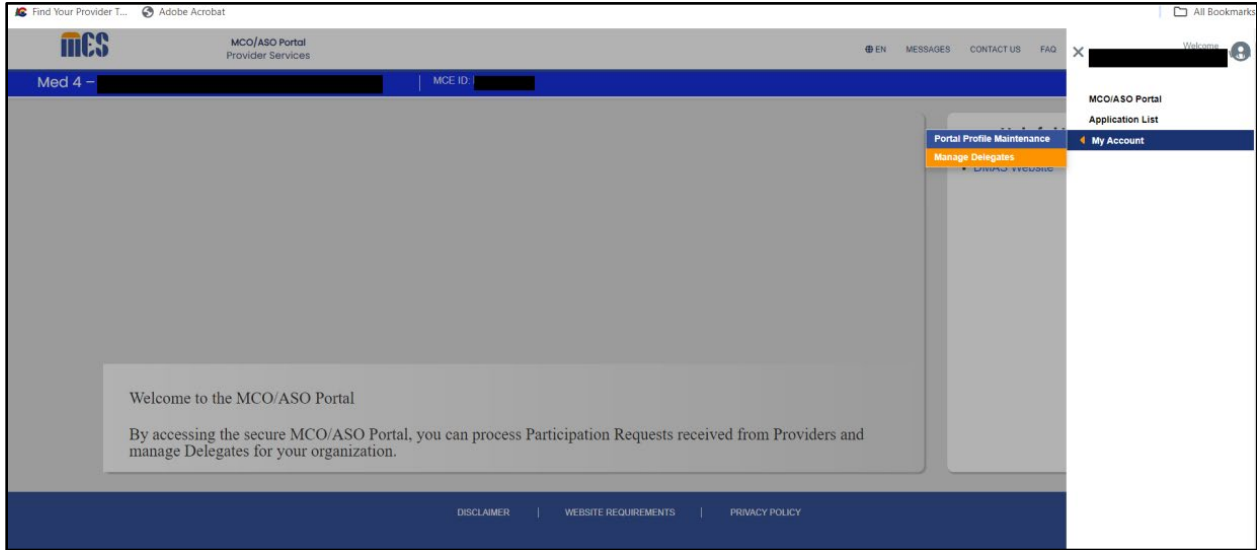
When a delegate has been assigned to more than one Organization, the Delegates page displays upon logging in. The Switch Organization feature enables delegates to select the Organization (s) on whose behalf they want to work.

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:

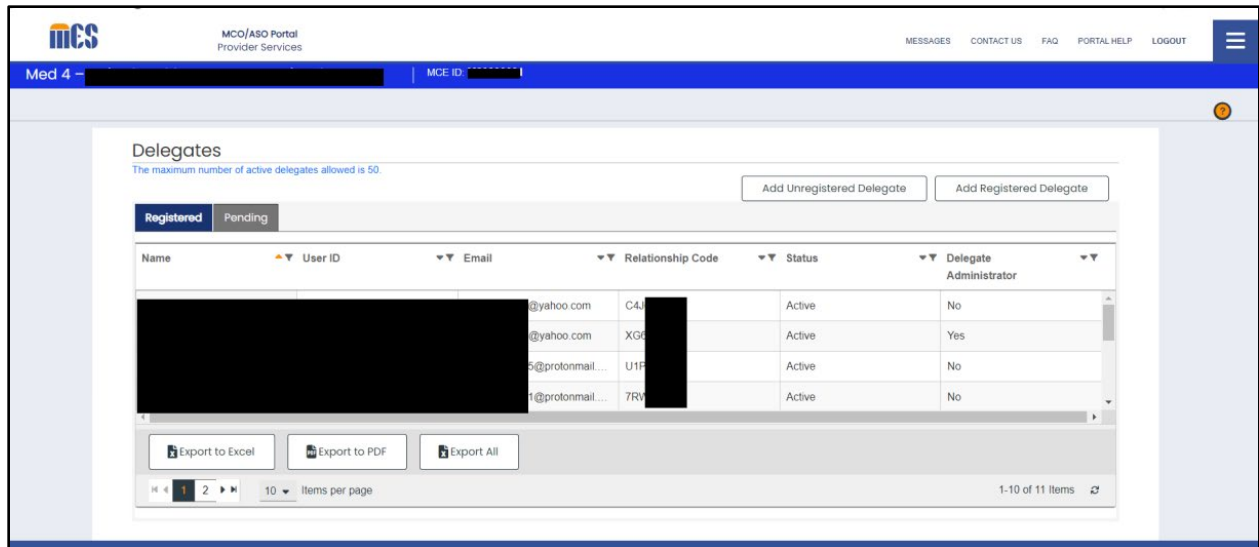
1. Complete Section **6.2 MCO Portal Log in** steps.
2. The **Switch Organization** window appears rather than the **MCO/ASO Portal Secure Home** page. Click the Organization you want to work on behalf of, then click **SUBMIT**. Refer to Figure 4-11.

Figure 4-11: Manage/Switch Organization Delegates



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 Provider**. Refer to Figure 4-13.
 - a. From the Navigation Menu, select **My Account**.
 - b. Click **Switch Provider**.
 - c. From the Organization Identifier bar, click **Go to Switch Provider**.

Figure 4-13: Switch Organization

5 MES Secure MCO/ASO Portal Navigation

5.1 At-a-Glance Bar

Located at the top of every page, the At-a-Glance bar lists all available functions from the current window. Refer to Figure 5-1 and Table 5-1 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

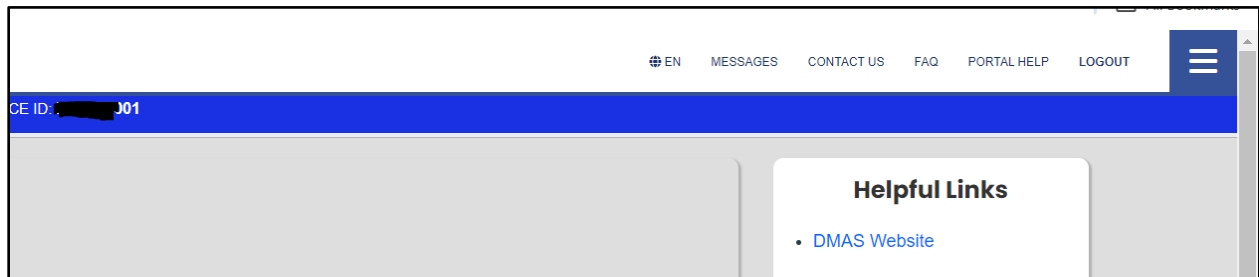
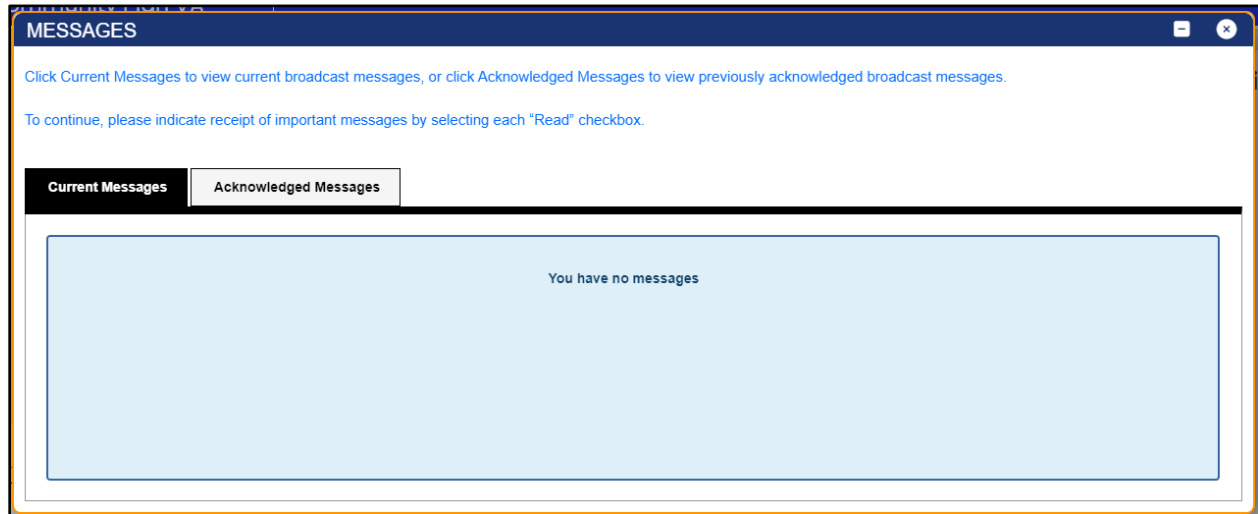


Table 5-1: At a Glance Bar

Function	Description
----------	-------------

Messages	<p>View broadcast messages related to system outages, system upgrades, new system features, important information messages, and various other reasons.</p> <p>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.</p> <p>Any messages that need to be acknowledged are considered the highest priority and thus display at the top of Current Messages. Select the Read check box to acknowledge.</p>
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.

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

CONTACT US Open in separate window

Contact Us

Use this directory to contact us by phone or mail. Send us an Email

To report any issues, click on the online link for webmaster mail at the right.

Mailing Address

Virginia Medicaid Provider Enrollment Services
PO Box 26803
Richmond, VA 23261

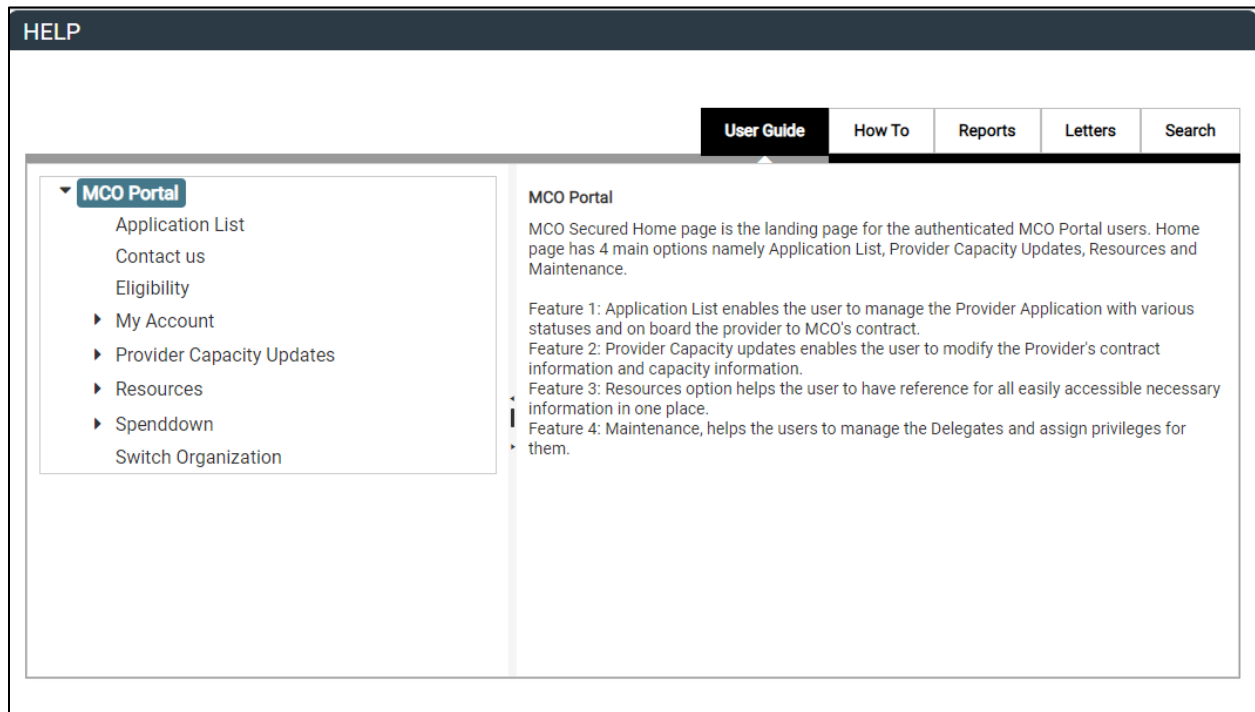
Customer Service

Hours (EST) : 8:00 a.m. – 5:00 p.m. Mon-Fri
Phone : (804)270-5105 or (888)829-5373
Fax : (804)270-7027 or (888)335-8476
Email : VAMedicaidProviderEnrollment@gainwelltechnologies.com

Automated Response Line

Hours : 24 hours per day, 7 days a week
Phone (Richmond Area) : 1-800-772-9996
Phone (USA) : 1-800-884-9730

Figure 5-4: 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 5-5: Navigation Menu

Refer to Table 5-2 for descriptions of the modules available from the **Navigation Menu**.





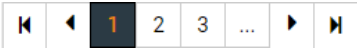
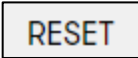



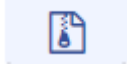

Table 5-2: Primary Features

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.

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 5-3 for a listing and description of the interactive features.

Table 5-3: Interactive Features

Name	Icon	Description
Cancel		Cancels the search, closes the window, or ignores changes and returns information to their original values.
Edit		Allows changes to the record.
Filter		Opens filter options for search results. Filters do not apply to all columns.
Help		Opens the system help page.
Paging		Navigate through search results using arrows or page numbers.
Reset		Resets any changes back to the last save point.
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		Changes the MCO Status to the selected option.

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 and Table 6-1 for an overview of the fields.

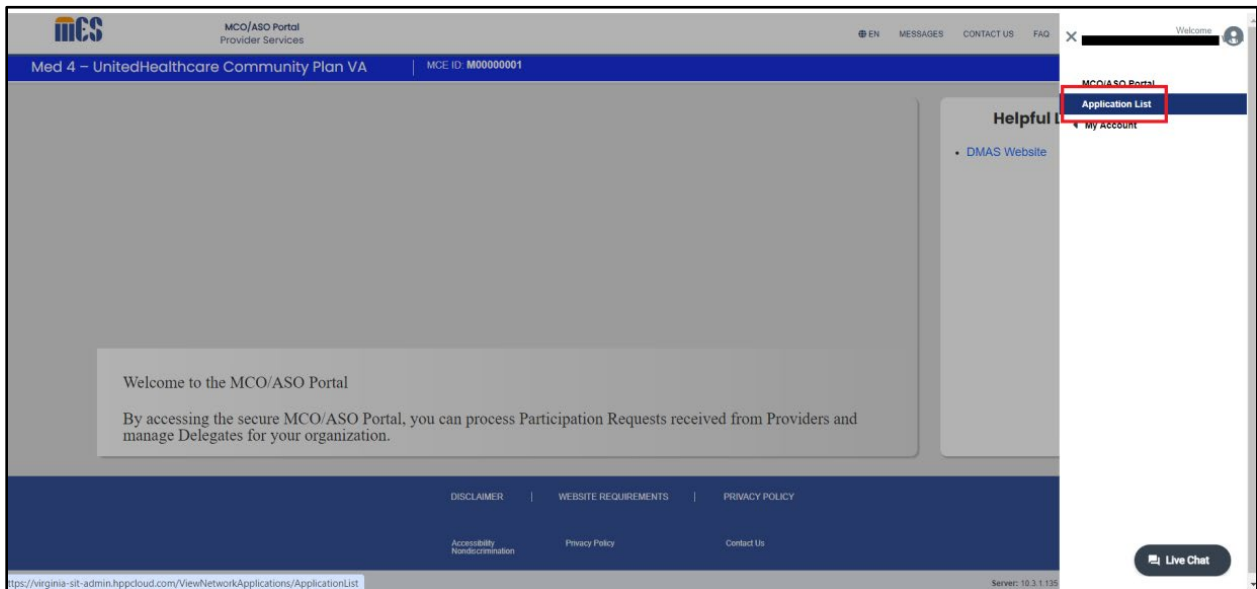


Figure 6-1: Application List

MCO Applications

The Records are sorted based on the MCO status with default filtering being applied on the status Pending. To view records with other MCO statuses, clear out the filter applied on the MCO status column. Click on the zip icon to download the provider enrollment information. Only applications with a status of Pending, Retrieved, Credentialing Passed, Attachment Required and Contract Rejected can be edited to establish the provider/MCO contract.



Type	Service Location	NPI	Name	Provider Type	Provider Specialty	Published Date	MCO Status	Reason Code	MCO Status Date	Enroll...
▶ New Enrollment	300299322...	7046827144	RTC 77	077 - Residential Treatment Facility	135 - ARTS - Residential Treatment - ASAM 3.5 - Adults	8/01/2024	Pending		8/01/2024	[Download] [Edit]
▶ New Enrollment	300299322...	6889543511	RTC	077 - Residential	233 - ARTS - Residential	7/31/2024	Pending		7/31/2024	[Download] [Edit]

Audit [Export All] [Export All]

10 Items per page 1-4 of 4 Items



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.


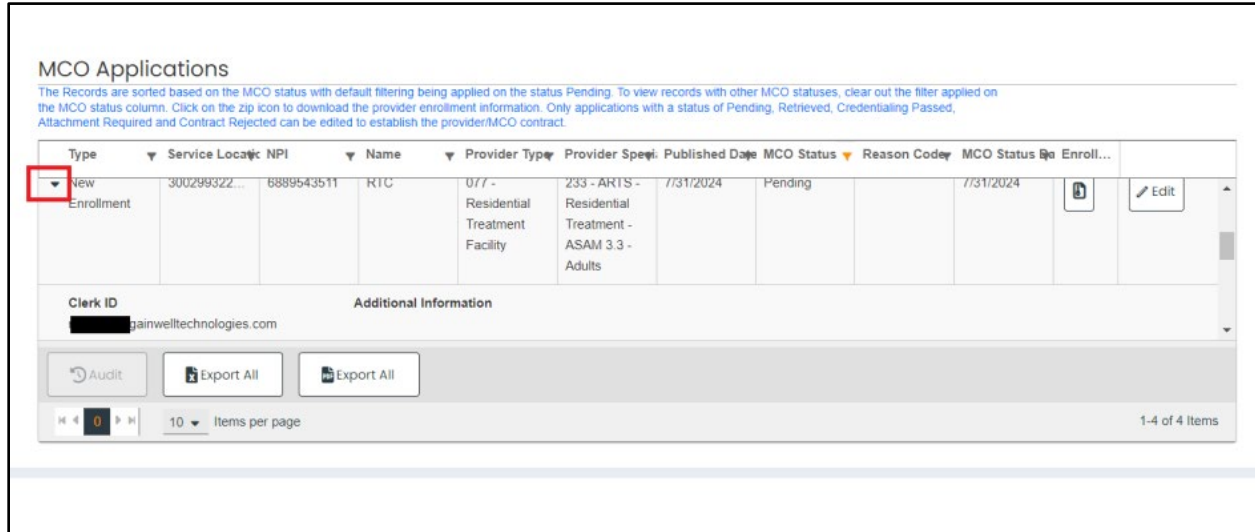
- You have the option to export the table data to Excel or a PDF with the buttons at the bottom of the list.
2. To view additional information about an application, click  to expand row navigation to view additional fields. Refer to Figure 6-2.

Figure 6-2: View



Additional Fields

Table 6-1: Elements of the MCO Applications Panel

Option	Description
Type	<p>The Type column indicates the type of application for the line in question. Application types include:</p> <ul style="list-style-type: none"> • 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 ID number for covered health care providers.
Name	The Name column shows the Provider's business name.

Option	Description
Provider Type	The Provider Type column shows the kinds of services the Provider offers.
Provider Specialty	The Provider Specialty column show the provider's specialty as entered in the enrollment application.
Published Date	Find the date the provider application became available in the Published Date column.
MCO Status	<p>The MCO Status shows the enrollment status. Not all statuses are required but are flexible process options for MCOs, depending on the review steps. Statuses include:</p> <ul style="list-style-type: none"> • Acknowledged • Attachment Added • Attachment Required • Contract Accepted • Contract Rejected • Credentialing Failed • Credentialing Passed • Pending • Provider Declined • Retrieved • Cancelled
Reason Code	The Reason Code defines the reason a clerk selected a specific MCO status.
MCO Status Date	The MCO Status Date shows the date the application entered its current status.
Clerk ID	The Clerk ID column identifies who placed the application in its current status.

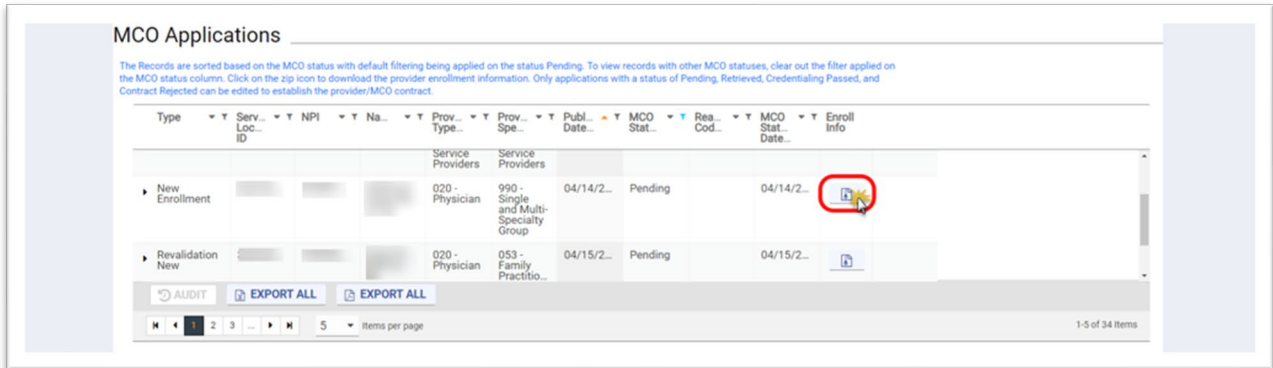
6.1 Download MCO Application

The first step to working on an 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 Information



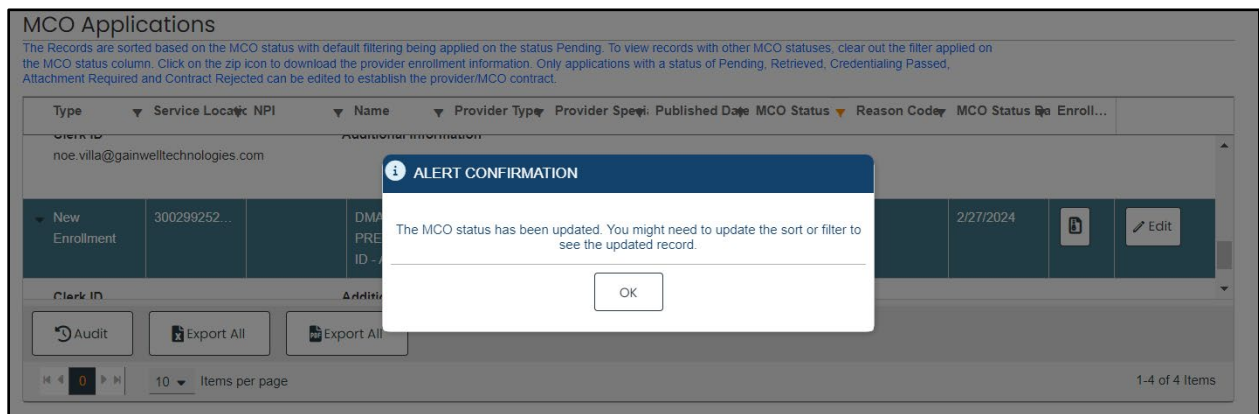
*Note: To download a complete list of applications, apply the filters to target your search and minimize generation time, then click **Export All**.*



*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



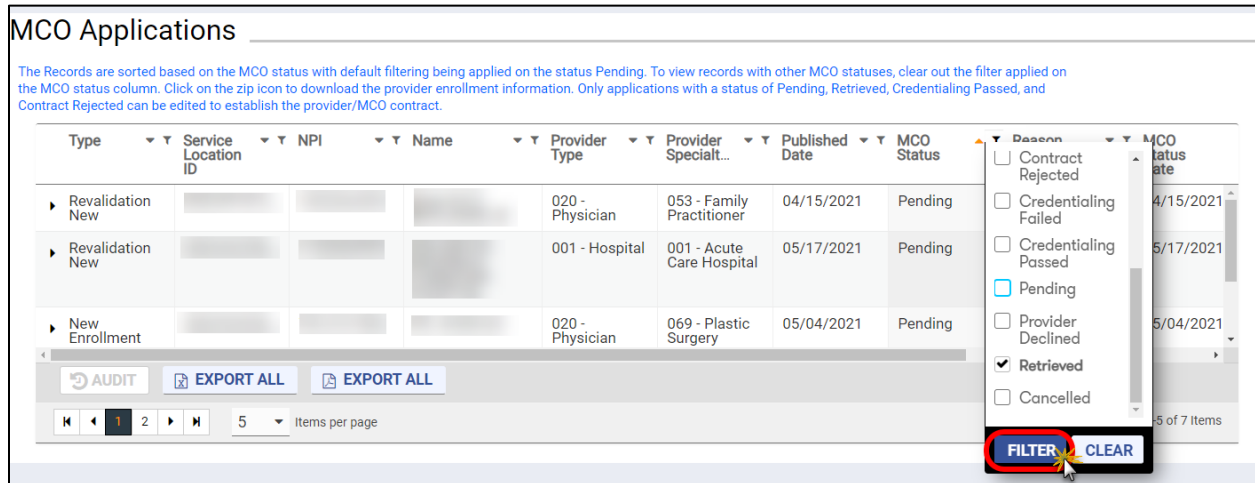
- The **MCO Status** is automatically updated from **Pending** to **Retrieved** when the ZIP file is successfully downloaded.



Note: The Applications List filters automatically. To see what is received, the filter will need to be adjusted to include Retrieved. See step 3 below (6.1 step 3) and 6.3 step 1.

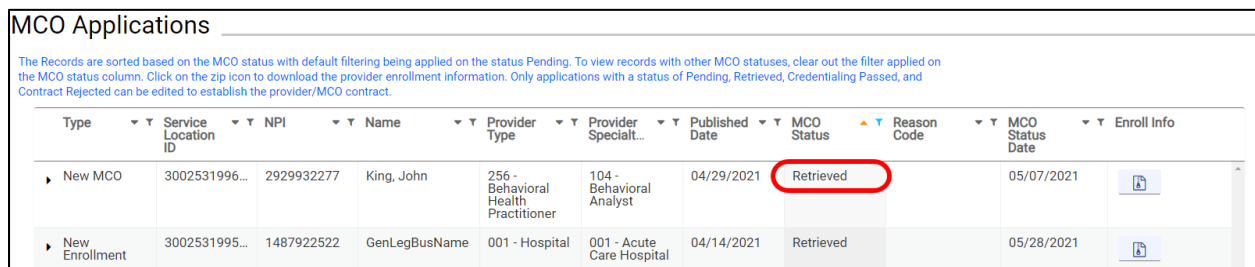
- The **MCO Status Date** is updated with the date on which the status changes.
 - The application is downloaded as a PDF to your computer.
3. To confirm which applications have been downloaded for review, click the **MCO Status** filter icon and select the **Retrieved** status, then click **FILTER**. 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 Update the MCO Status

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

1. If the **Retrieved** status is not included in the applications list, click the MCO Status 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

MCO Applications

The Records are sorted based on the MCO status with default filtering being applied on the status Pending. To view records with other MCO statuses, clear out the filter applied on the MCO status column. Click on the zip icon to download the provider enrollment information. Only applications with a status of Pending, Retrieved, Credentialing Passed, and Contract Rejected can be edited to establish the provider/MCO contract.

Type	Service Location ID	NPI	Name	Provider Type	Provider Specialt...	Published Date	MCO Status	Reason Code	MCO Status Date	Enroll Info
New Enrollment				001 - Hospital	001 - Acute Care Hospital	04/14/2021	Retrieved		05/28/2021	EDIT
New MCO				256 - Behavioral Health Practitioner	104 - Behavioral Analyst	04/29/2021	Retrieved		05/07/2021	EDIT

AUDIT EXPORT ALL EXPORT ALL

5 Items per page 1-2 of 2 Items

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

Figure 6-8: Select MCO Status

MCO Applications

The Records are sorted based on the MCO status with default filtering being applied on the status Pending. To view records with other MCO statuses, clear out the filter applied on the MCO status column. Click on the zip icon to download the provider enrollment information. Only applications with a status of Pending, Retrieved, Credentialing Passed, and Contract Rejected can be edited to establish the provider/MCO contract.

Type	Service Location ID	NPI	Name	Provider Type	Provider Specialt...	Published Date	MCO Status	Reason Code	MCO Status Date	Enroll Info
New Enrollment				001 - Hospital	001 - Acute Care Hospital	04/14/2021	Attach...		05/28/2021	UPDATE CANCEL
New MCO				256 - Behavioral Health Practitioner	104 - Behavioral Analyst	04/29/2021	Contract Accepted		05/07/2021	EDIT

AUDIT EXPORT ALL EXPORT ALL

5 Items per page 1-2 of 2 Items

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

Figure 6-9: Select MCO Reason Code

MCO Applications

The Records are sorted based on the MCO status with default filtering being applied on the status Pending. To view records with other MCO statuses, clear out the filter applied on the MCO status column. Click on the zip icon to download the provider enrollment information. Only applications with a status of Pending, Retrieved, Credentialing Passed, and Contract Rejected can be edited to establish the provider/MCO contract.

Type	Service Location ID	NPI	Name	Provider Type	Provider Specialt...	Published Date	MCO Status	Reason Code	MCO Status Date	Enroll Info
New Enrollment				990 - Group Practice	990 - Single and Multi-Specialty Group	06/07/2021	Attach...	Further information needed from provider	06/21/2021	UPDATE CANCEL

AUDIT EXPORT ALL EXPORT ALL

5 Items per page 1-1 of 1 Items

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



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

Figure 6-10: Updated MCO Status

MCO Applications

The Records are sorted based on the MCO status with default filtering being applied on the status Pending. To view records with other MCO statuses, clear out the filter applied on the MCO status column. Click on the zip icon to download the provider enrollment information. Only applications with a status of Pending, Retrieved, Credentialing Passed, and Contract Rejected can be edited to establish the provider/MCO contract.

Type	Service Location ID	NPI	Name	Provider Type	Provider Specialt...	Published Date	MCO Status	Reason Code	MCO Status Date	Enroll Info
New Enrollment				990 - Group Practice	990 - Single and Multi-Specialty Group	06/07/2021	Credentialing Passed	Credentialing passed no findings	06/22/2021	EDIT

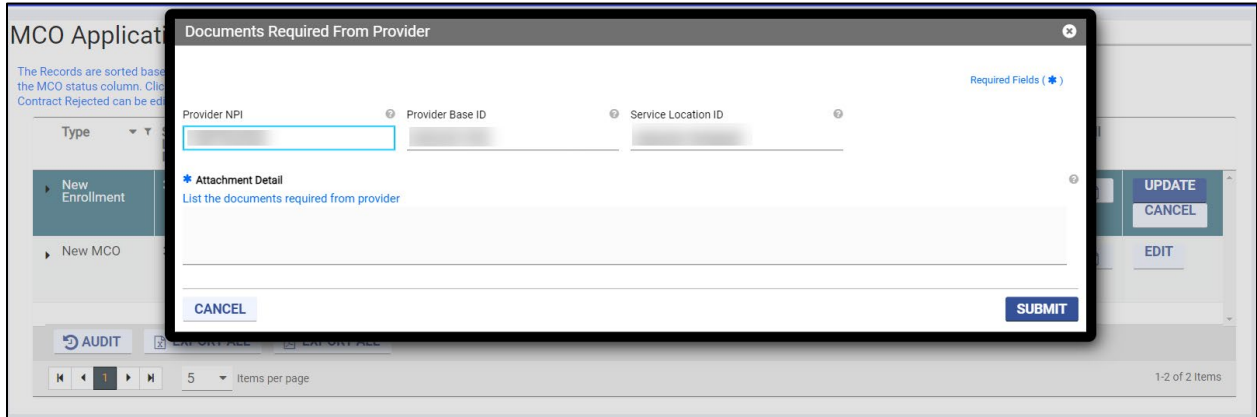
6.2.1 Attachment Required

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:

- If necessary, adjust the **MCO Status** filter to include a specific status or all statuses.
- Click **EDIT** for the record.
- From the **MCO Status** column dropdown list, select **Attachment Required**.
- Select a **Reason Code** from the dropdown list, then click **UPDATE**.
- A **Documents Required From Provider** window appears.

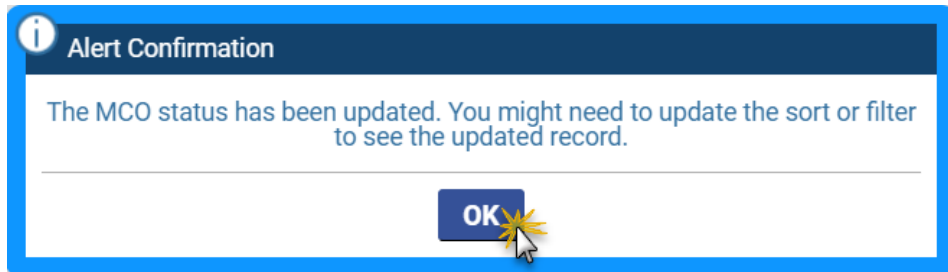
- In the **Attachment Detail** field, enter the required document details, then click **SUBMIT**. Refer to Figure 6-11.

Figure 6-11: Attachment Required



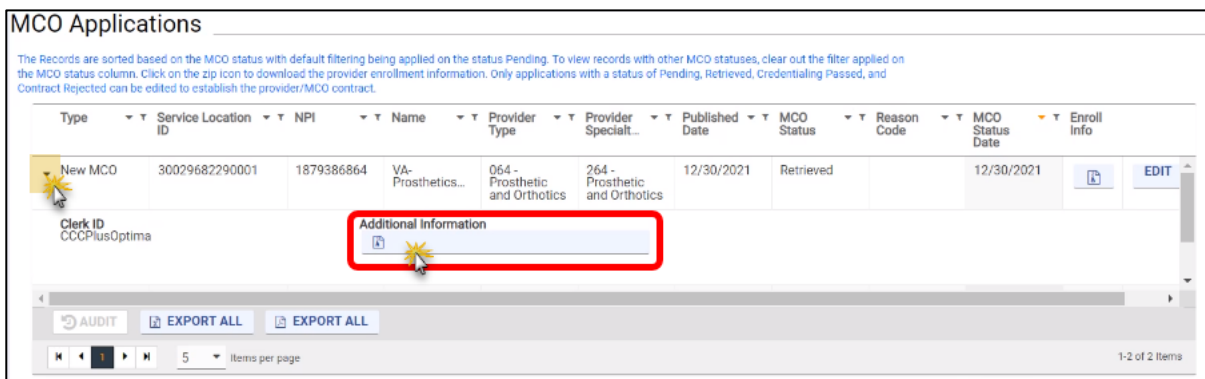
- Review the Alert Confirmation and click **OK** to accept. A message is sent to Provider Portal, alerting the Provider to the document request. Refer to Figure 6-12.

Figure 6-12: Alert Confirmation



- The **MCO Status** changes to **Attachment Added** once the provider uploads the documents.
- A consolidated ZIP file is available in the expanded row under **Additional Information** for the MCO/ASO clerk to review.

Figure 6-13: Attachments Added



6.3 Verify Credentialing

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.

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.



*Note: If **Credentialing Failed** or **Provider Declined** are selected, the record can no longer be modified, and no contract will be created for the Provider.*

6.4 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: If **Contract Accepted** is selected, the record can no longer be modified. If **Contract Rejected** is selected, the record can be set back to **Pending** status.*

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

6.4.1 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 6-14.

Figure 6-14: Contract Accepted

MCO Applications

The Records are sorted based on the MCO status with default filtering being applied on the status Pending. To view records with other MCO statuses, clear out the filter applied on the MCO status column. Click on the zip icon to download the provider enrollment information. Only applications with a status of Pending, Retrieved, Credentialing Passed, and Contract Rejected can be edited to establish the provider/MCO contract.

Type	Service Location ID	NPI	Name	Provider Type	Provider Specialt...	Published Date	MCO Status	Reason Code	MCO Status Date	Enroll Info	
New Enrollment				020 - Physician	053 - Family Practitioner	06/04/2021	Retriev...		06/14/2021		UPDATE CANCEL
Revalidation Existing				117 - Doula	717 - Doula	06/14/2021	Contract Accepted		06/14/2021		
New Enrollment				056 - Waiver Services	801 - Adult Day Health Care	06/09/2021	Contract Rejected		06/09/2021		

AUDIT EXPORT ALL EXPORT ALL

1 2 3 ... 5 Items per page 1-5 of 16 Items

3. Select a reason from the **Reason Code** dropdown, then click **UPDATE**. Refer to Figure 6-15.

Figure 6-15: Contract Approved Reason Code

MCO Applications

The Records are sorted based on the MCO status with default filtering being applied on the status Pending. To view records with other MCO statuses, clear out the filter applied on the MCO status column. Click on the zip icon to download the provider enrollment information. Only applications with a status of Pending, Retrieved, Credentialing Passed, and Contract Rejected can be edited to establish the provider/MCO contract.

Type	Service Location ID	NPI	Name	Provider Type	Provider Specialt...	Published Date	MCO Status	Reason Code	MCO Status Date	Enroll Info	
New Enrollment	300275557400	5610689866	Wang, Abby	020 - Physician	053 - Family Practitioner	06/04/2021	Contract	Contract approved after negotiation	06/21/2021		UPDATE CANCEL

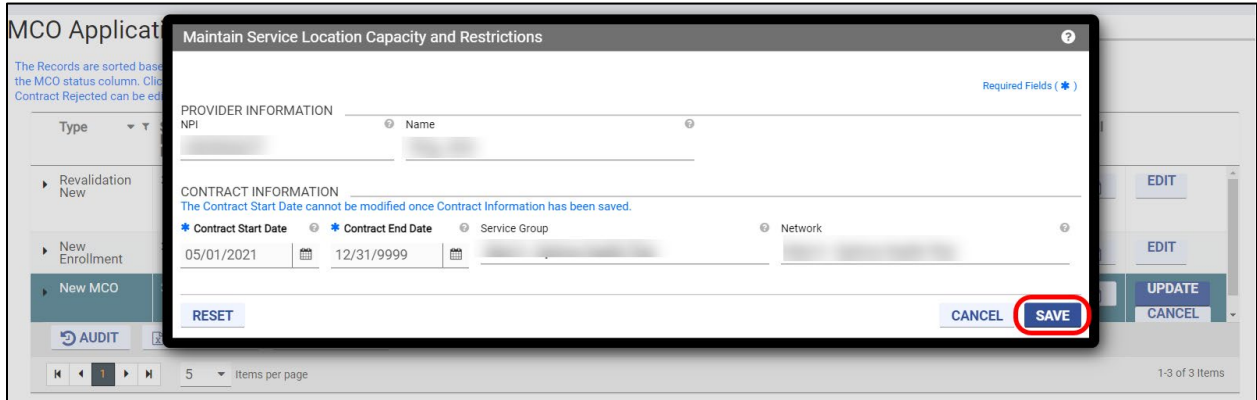
AUDIT EXPORT ALL EXPORT ALL

1 5 Items per page 1-1 of 1 Items

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.

- The **Maintain Service Location Capacity and Restrictions** window appears. Refer to Figure 6-16.

Figure 6-16: Maintain Service Location Capacity and Restrictions



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



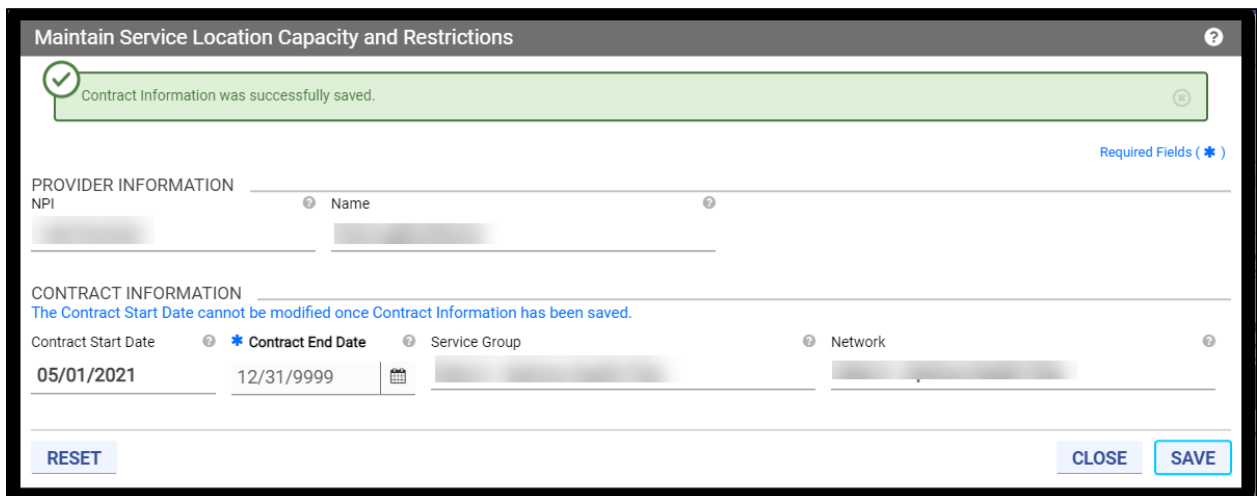
*Note: The **Contract Start Date** may be retroactively applied but cannot be earlier than the Provider's VA Medicaid program approval date. Use 12/ 31/ 9999 as the **Contract End Date** unless there is a reason to set the Provider up with temporary participation.*

- A Confirmation Message appears. Click **CLOSE** to exit and return to the **MCO Applications** list. Refer to Figure 6-17.



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

Figure 6-17: Confirmation Message



6.4.2 Contract Rejected



Note: Applications to participate in MCO programs may not be rejected through the Provider Network (PRN) file exchange 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 6-18.

Figure 6-18: Contract Rejected

MCO Applications

The Records are sorted based on the MCO status with default filtering being applied on the status Pending. To view records with other MCO statuses, clear out the filter applied on the MCO status column. Click on the zip icon to download the provider enrollment information. Only applications with a status of Pending, Retrieved, Credentialing Passed, and Contract Rejected can be edited to establish the provider/MCO contract.

Type	Service Location ID	NPI	Name	Provider Type	Provider Specialt...	Published Date	MCO Status	Reason Code	MCO Status Date	Enroll Info
Revalidation New				001 - Hospital	001 - Acute Care Hospital	05/17/2021	Contract	Contract	05/31/2021	UPDATE CANCEL
New MCO				256 - Behavioral Health Practitioner	104 - Behavioral Analyst	04/29/2021	Retrieved		05/07/2021	EDIT

AUDIT EXPORT ALL EXPORT ALL

5 Items per page 1-2 of 2 Items

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.

- The clerk is returned to the **MCO Applications** list, and the MCO status is updated to **Contract Rejected**. Refer to Figure 6-19.



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

Figure 6-19: Contract Rejected MCO Status

MCO Applications

The Records are sorted based on the MCO status with default filtering being applied on the status Pending. To view records with other MCO statuses, clear out the filter applied on the MCO status column. Click on the zip icon to download the provider enrollment information. Only applications with a status of Pending, Retrieved, Credentialing Passed, and Contract Rejected can be edited to establish the provider/MCO contract.

Type	Service Location ID	NPI	Name	Provider Type	Provider Specialt...	Published Date	MCO Status	Reason Code	MCO Status Date	Enroll Info
New Enrollment				020 - Physician	053 - Family Practitioner	06/04/2021	Contract Rejected	Contract Rejected due to findings	06/21/2021	EDIT

AUDIT EXPORT ALL EXPORT ALL

5 Items per page 1-1 of 1 Items

6.5 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 6-20.

- 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 6-20: Revalidation

MCO Applications

The Records are sorted based on the MCO status with default filtering being applied on the status Pending. To view records with other MCO statuses, clear out the filter applied on the MCO status column. Click on the zip icon to download the provider enrollment information. Only applications with a status of Pending, Retrieved, Credentialing Passed, and Contract Rejected can be edited to establish the provider/MCO contract.

Type	Service Location ID	NPI	Name	Provider Type	Provider Specialt...	Published Date	MCO Status	Reason Code	MCO Status Date	Enroll Info
Revalidation New				001 - Hospital	001 - Acute Care Hospital	05/17/2021	Pending		05/17/2021	
Revalidation Existing				020 - Physician	072 - Radiology	05/05/2021	Pending		05/05/2021	
New Enrollment				020 - Physician	069 - Plastic Surgery	05/04/2021	Pending		05/04/2021	

AUDIT EXPORT ALL EXPORT ALL

1 2 Items per page 1-5 of 8 Items

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.

- The MCO status is updated to **Retrieved** once the ZIP file is successfully downloaded. Refer to Figure 6-21.

Figure 6-21: Retrieved Status

MCO Applications

The Records are sorted based on the MCO status with default filtering being applied on the status Pending. To view records with other MCO statuses, clear out the filter applied on the MCO status column. Click on the zip icon to download the provider enrollment information. Only applications with a status of Pending, Retrieved, Credentialing Passed, and Contract Rejected can be edited to establish the provider/MCO contract.

Type	Service Location ID	NPI	Name	Provider Type	Provider Specialt...	Published Date	MCO Status	Reason Code	MCO Status Date	Enroll Info
New Enrollment				001 - Hospital	001 - Acute Care Hospital	04/14/2021	Retrieved		05/28/2021	EDIT
Revalidation Existing				256 - Behavioral Health Practitioner	104 - Behavioral Analyst	04/29/2021	Retrieved		05/07/2021	EDIT

AUDIT EXPORT ALL EXPORT ALL

5 Items per page 1-2 of 2 Items

- Verify downloaded documents, and then update the MCO status to **Acknowledged**. This is the final status of the application. Refer to Figure 6-22.



Note: Revalidation Existing only allows the acknowledged option. If changes need to be made, including rejection, the need to be made through the PRN process.

Figure 6-22: Acknowledged Status

MCO Applications

The Records are sorted based on the MCO status with default filtering being applied on the status Pending. To view records with other MCO statuses, clear out the filter applied on the MCO status column. Click on the zip icon to download the provider enrollment information. Only applications with a status of Pending, Retrieved, Credentialing Passed, and Contract Rejected can be edited to establish the provider/MCO contract.

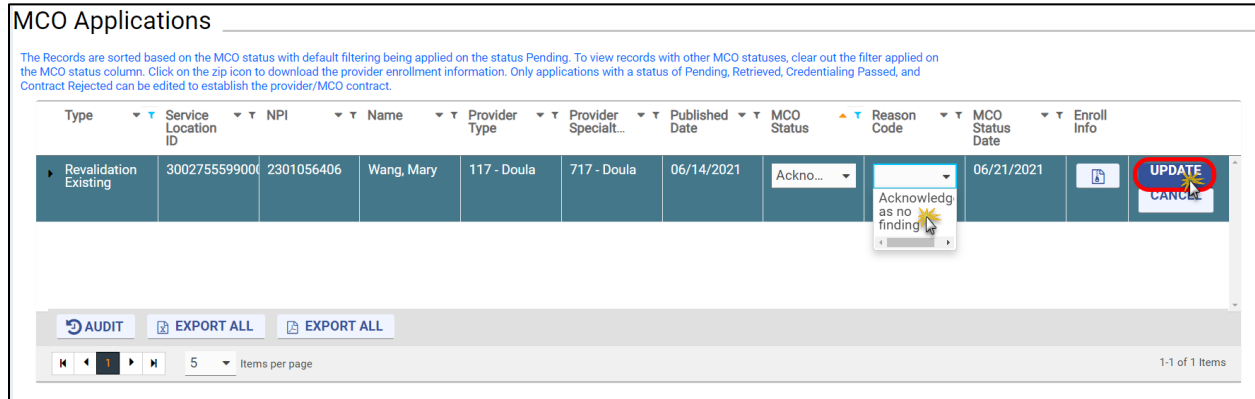
Type	Service Location ID	NPI	Name	Provider Type	Provider Specialt...	Published Date	MCO Status	Reason Code	MCO Status Date	Enroll Info
Revalidation Existing				117 - Doula	717 - Doula	06/14/2021	Retrie...		06/21/2021	UPDATE CANCEL

AUDIT EXPORT ALL EXPORT ALL

5 Items per page 1-1 of 1 Items

5. Select a **Reason Code** from the dropdown list and click **Update**. Refer to Figure 6-23.

Figure 6-23: Select Reason Code



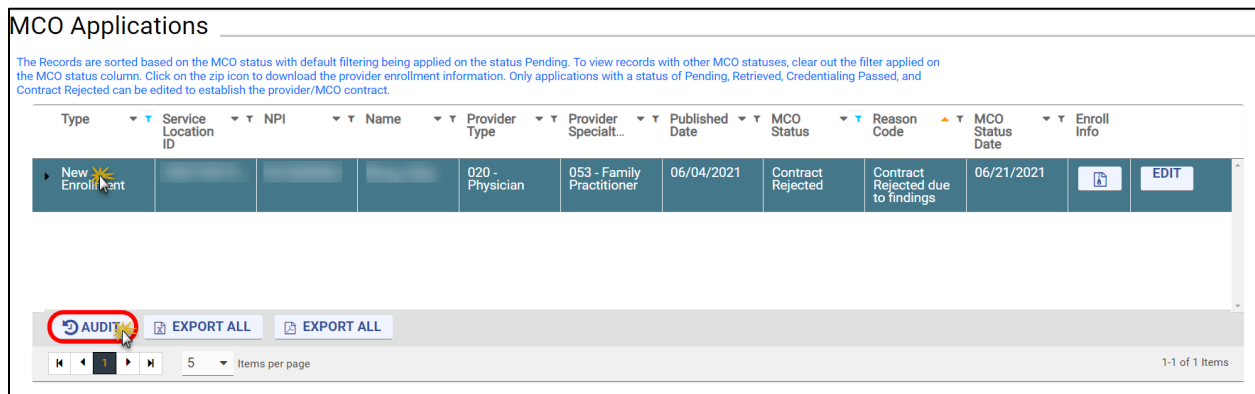
6. Click **YES** when the **Alert Confirmation** message displays, advising the clerk once **Acknowledge** is selected as the MCO Status. The application is complete, and the record can no longer be modified.
7. The MCO's confirmation is sent to Provider Portal for Provider review and Provider Management for PRSS Clerk review.

6.6 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.

- 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

Event Stamp Date	MCE ID	Service Location ID	ATN	NPI	User ID	Source Of Change									
05/31/2021 3:53:38 PM						ManagedCarePortal									
<table border="1"> <thead> <tr> <th>Field Description</th> <th>Before Value</th> <th>After Value</th> </tr> </thead> <tbody> <tr> <td>MCO Status</td> <td>07 - Retrieved</td> <td>02 - Contract Rejected</td> </tr> <tr> <td>Reason Code</td> <td></td> <td>CRF - Contract Rejected due to findings</td> </tr> </tbody> </table>							Field Description	Before Value	After Value	MCO Status	07 - Retrieved	02 - Contract Rejected	Reason Code		CRF - Contract Rejected due to findings
Field Description	Before Value	After Value													
MCO Status	07 - Retrieved	02 - Contract Rejected													
Reason Code		CRF - Contract Rejected due to findings													
05/31/2021 3:25:21 PM						ManagedCarePortal									
05/17/2021 3:51:23 PM						ProviderEnrollment									

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

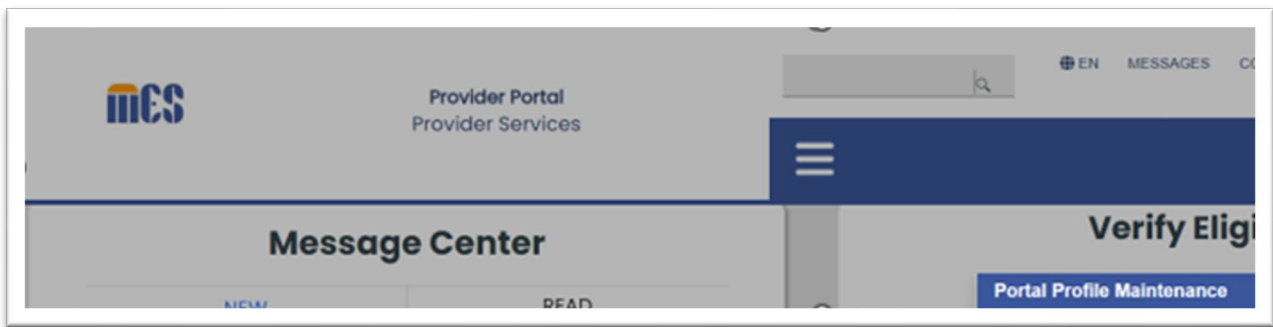
In the Portal Profile Maintenance window, an MCO/ASO can view their contact information. Users can view the contact's Name, Display Name, Phone Number, Current Email, and Primary Language.

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 (Maintenance)**, 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. The **My Account Profile** window displays 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 the **Relationship Code** listed on your account profile and ask to be added as a Delegate. Refer to Figure 7-4.

Figure 7-4: View My Account Profile Delegate

MY ACCOUNT PROFILE

CONTACT INFORMATION

User ID

First Name Middle Name Last Name

Display Name

Phone Number Current Email Relationship Code

ROLES

Current Roles

PREFERENCES

Primary Language

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. An MCO may have multiple Delegates such as administrative or clerical staff who perform different tasks.



Note: The maximum number of delegates in the MCO portal is fifty.

There are two types of delegates:

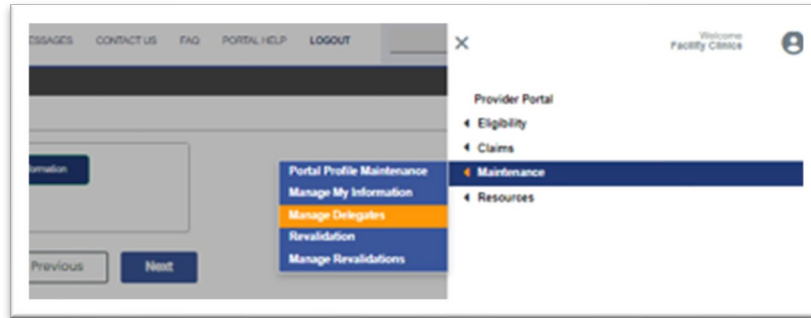
- **Delegates** perform functions in the MCO/ASO Portal that are assigned by the user they represent.
- **Delegate Administrators (DA)** can access all functions available to the user they represent. This includes creating other delegates assigned to work on behalf of a user.

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

Delegates

The maximum number of active delegates allowed is 15.

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

[Registered](#) [Pending](#)

Name	User ID	Email	Relationship Code	Status	Delegate Administrator
[Redacted]	[Redacted]	[Redacted]	F0MXV6NF	Active	Yes
[Redacted]	[Redacted]	[Redacted]	XG68GPZP	Active	Yes
[Redacted]	[Redacted]	[Redacted]	4JI4V024	Active	No
[Redacted]	[Redacted]	[Redacted]	N5HLM1VM	Active	No
[Redacted]	[Redacted]	[Redacted]	RA23A1FO	Active	No
[Redacted]	[Redacted]	[Redacted]	60027150	Active	Yes

[EXPORT TO EXCEL](#) [EXPORT TO PDF](#)

10 Items per page 1 - 6 of 6 items



*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.

- 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 screenshot shows the 'Assign Delegate' window. At the top, there are input fields for 'First Name', 'Last Name', and 'User ID'. Below these are 'Email' and 'Relationship Code' (displayed as '4J14V024'). An 'Active' checkbox is checked. A note states: 'Managed Care Organizations can specify that this is a Delegate Administrator. The Delegate Administrator will automatically be given all security functions and has the ability to add and maintain delegates for the MCO.' Below this is a 'Delegate Administrator' checkbox. The 'SECURITY FUNCTIONS' section includes instructions: 'Select the functions that the delegate is authorized to access. (At least one function must be selected.)' It features two lists: 'Available Functions' (including 'Spendedown Claims Submission Inquiry', 'Eligibility', 'Spendedown - Inquiry', 'Resources', 'Spendedown - Inquiry/Update', 'Provider Capacity and Restrictions - Inquiry/Update', and 'Provider Capacity and Restrictions - Inquiry') and 'Selected Functions' (including 'Application List - View' and 'Application List - View/Update').



Note: 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. Select your choice in the Assign Delegate window.

7.2.1.1 Assign All Security Functions

1. Check **Delegate Administrator** to assign the Delegate the ability to add and maintain other delegates for the MCO/ASO.
2. Click **SAVE** if updates are complete. Refer to Figure 7-8.
3. The Delegate is authorized to perform all security functions on behalf of the MCO.

Figure 7-8: Delegate Administrator Security Role

The screenshot shows the 'Assign Delegate' window with the following fields and controls:

- First Name:** [Redacted]
- Last Name:** [Redacted]
- User ID:** [Redacted]
- Email:** [Redacted]
- Relationship Code:** ERHEL8EE
- Active:**
- Managed Care Organizations can specify that this is a Delegate Administrator. The Delegate Administrator will automatically be given all security functions and has the ability to add and maintain delegates for the MCO.**
- Delegate Administrator:** (This checkbox is circled in red in the image)
- Buttons:** RESET, CANCEL, and SAVE (The SAVE button is circled in red in the image)

7.2.1.2 Assign Selected Security Functions

1. From the **Available Functions** list, select the **Security Function(s)** by clicking them and using the arrow buttons, then click **Save**. Refer to Figure 7-9.
 - a. Select a security function from the **Available Functions** list, then click > to move it to the **Selected Functions** list.
 - b. Click >> to move all security functions from the **Available Functions** list to the **Selected Functions** list.
 - c. Select a security function from the **Selected Functions** list, then click < to move it to the **Available Functions** list.
 - d. Click << to move all security functions from the **Selected Functions** list to the **Available Functions** list.

Figure 7-9: Select Security Functions

Assign Delegate

Relationship Code: FP9VCATI

Active:

Managed Care Organizations can specify that this is a Delegate Administrator. The Delegate Administrator will automatically be given all security functions and has the ability to add and maintain delegates for the MCO.

Delegate Administrator

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	Resources
Application List - View	
Application List - View/Update	
Spenddown - Inquiry/Update	
Provider Capacity and Restrictions - Inquiry/Update	
Provider Capacity and Restrictions - Inquiry	

RESET CANCEL SAVE

- The Delegate is authorized to perform the selected security functions on behalf of the MCO.



*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 7-10.*

Figure 7-10: Security Function Note

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

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 is 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 after 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**. Refer to Figure 7-11.

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

The screenshot shows a web application window titled "Add Registered Delegate". At the top right, there are icons for help and close, and a "Required Fields" indicator with a blue arrow. The form contains several input fields: a blurred text field, an "Email" field with a blurred value, a "Relationship Code" field with the value "FP9VCATI", and an "Active" checkbox which is checked. Below these fields is a blue informational message: "Managed Care Organizations can specify that this is a Delegate Administrator. The Delegate Administrator will automatically be given all security functions and has the ability to add and maintain delegates for the MCO." Underneath this message is a checkbox labeled "Delegate Administrator" which is currently unchecked. The "SECURITY FUNCTIONS" section follows, with a sub-instruction: "Select the functions that the delegate is authorized to access. (At least one function must be selected.)". This section contains two panes: "Available Functions" and "Selected Functions". The "Available Functions" list includes: "Spendedown Claims Submission Inquiry", "Eligibility", "Spendedown - Inquiry", "Application List - View", "Application List - View/Update", "Resources", and "Spendedown - Inquiry/Update". The "Selected Functions" pane is currently empty. Navigation arrows are present between the two panes. At the bottom right of the window, there are "CANCEL" and "SUBMIT" buttons.

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

The screenshot shows a web form titled "Add Registered Delegate". It contains several input fields: "First Name", "Last Name", "User ID", "Email", and "Relationship Code" (with the value "FP9VCATI"). There is also a dropdown menu for "Active" with "Active" selected. A red rectangular box highlights a checkbox labeled "Delegate Administrator", which is checked. Below the form, there are "CANCEL" and "SUBMIT" buttons. A note in blue text states: "Managed Care Organizations can specify that this is a Delegate Administrator. The Delegate Administrator will automatically be given all security functions and has the ability to add and maintain delegates for the MCO."

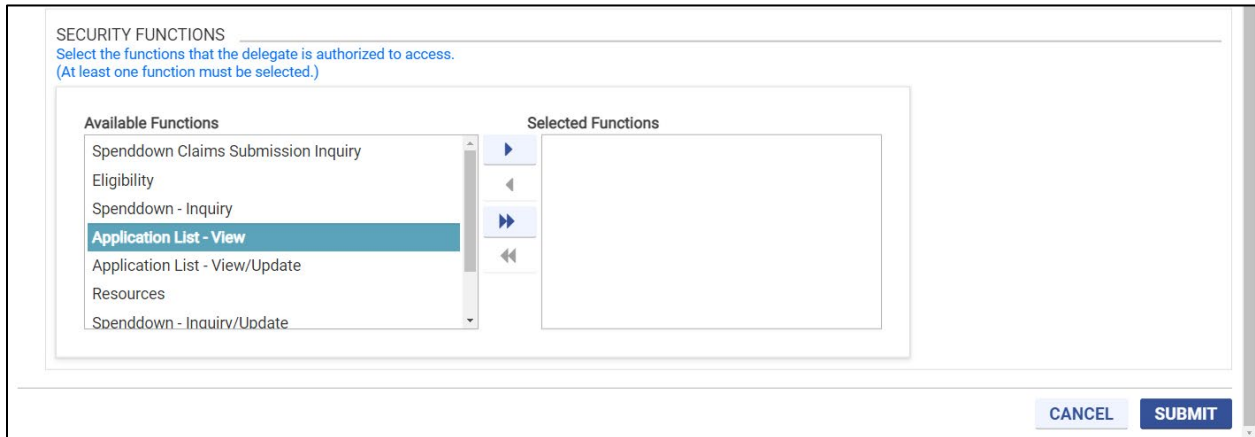
- b. If the Delegate is not an administrator, assign security functions to the new Delegate by highlighting an **Available Function**, then click ► to move the function to the **Selected Functions** box. Refer to Figure 7-15.

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

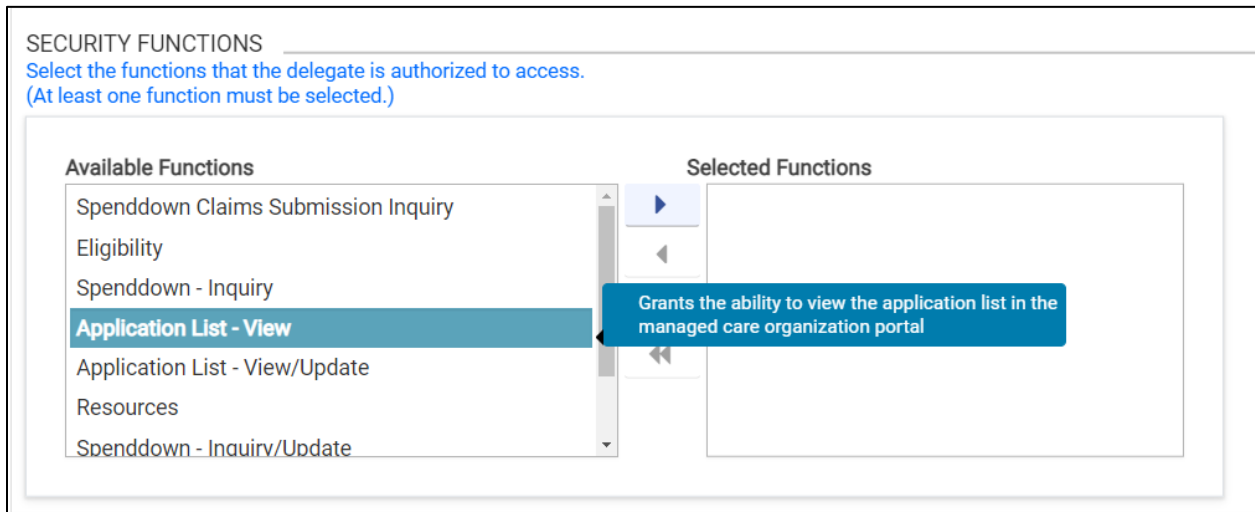


- Click ►► to move all **Available Functions** to the **Selected Functions** box to assign security functions to the selected Delegate.
- Remove security functions of a delegate by highlighting a **Selected Function** and then clicking ◀ to move the function to the **Available Functions** box.
- Click ◀◀ to move all **Selected Functions** to the **Available Functions** box to remove security functions of a delegate.
- Click **Submit** to save the delegate information. The user must select at least one security function for active delegates.



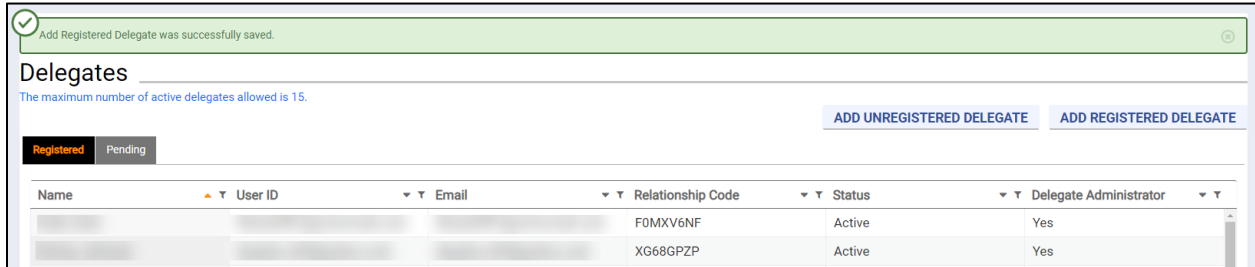
To learn more about security rights associated with a specific function, hover over the function name in the Available Function or Selected Function box. Refer to Figure 7-16.

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. Refer to Figure 7-19.

Figure 7-19: Add Unregistered Delegate

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 Managed Care 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 (select a value...) Active

Managed Care Organizations can specify that this is a Delegate Administrator. The Delegate Administrator will automatically be given all security functions and has the ability to add and maintain delegates for the MCO.

Delegate Administrator

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	

CANCEL **SUBMIT**

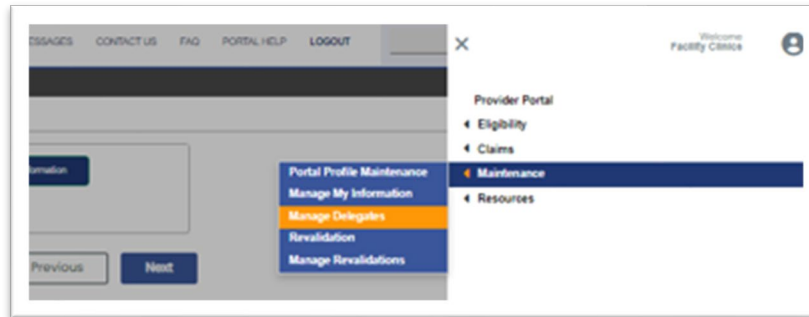
- The Delegate receives the emails to complete MCO/ASO Portal registration. The Delegate will be able to access the MCO/ASO's account from **Switch Organization** as soon as registration is complete. Refer to Section 4.1 - **MCO Portal Registration – Delegates**.

7.2.3 Activate/Inactivate Delegate

Once a delegate is added, the Delegate cannot be deleted. However, security rights may be inactivated. If an inactivated delegate needs to be reinstated, reactivate the delegate's access rather than trying to add the Delegate again.

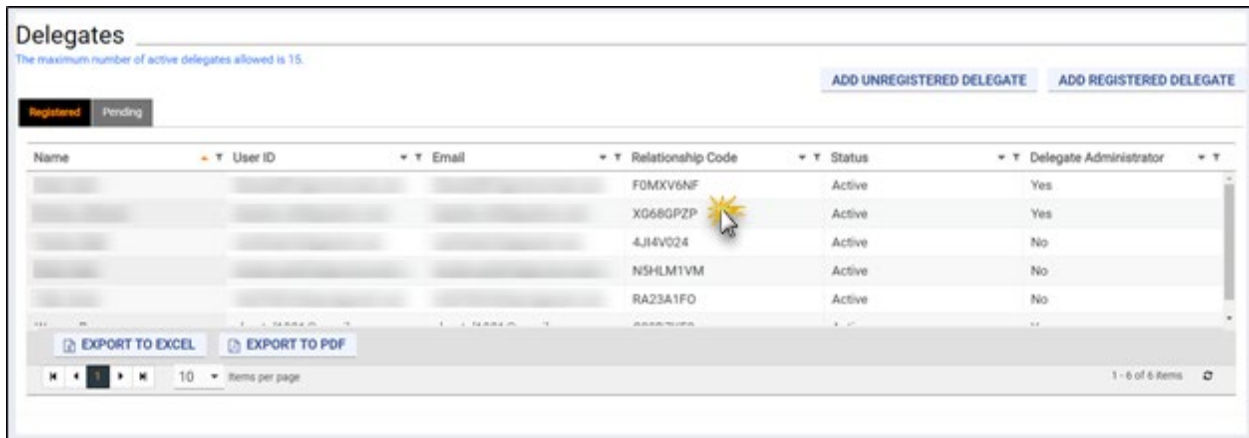
1. From the **Secure Home** page, click **My Account** and select **Manage Delegates**. Refer to Figure 7-20.

Figure 7-20: Manage Delegates Menu



2. The **Delegates** page displays. The delegates currently assigned display on the **Registered** tab. Double-click the delegate record that you want to activate or inactivate. Refer to Figure 7-21.

Figure 7-21: Delegates Page



Note: If you do not see the Delegate, update the Status filter to include Inactivate.

3. Select or de-select the **Active** check box to change the Delegate's security status for the MCO Portal. Refer to Figure 7-22.

Figure 7-22: Change Delegate Status

The screenshot shows a web form titled "Assign Delegate" with a close button (X) and a help button (?). The form contains several input fields: "First Name" (value: MCO), "Last Name" (value: Delegate), "User ID" (value: [redacted]), "Email" (value: [redacted]), and "Relationship Co..." (value: ERZXUTX5). A checkbox labeled "Active" is checked and highlighted with a red rectangular box. Below the form, there is a text box containing the text: "Managed Care Organizations can specify that this is a Delegate Administrator. The Delegate Administrator will automatically be given all security functions and has the ability to add and maintain delegates for the MCO." Below this text is another checkbox labeled "Delegate Administrator" which is also checked. At the bottom of the form are three buttons: "RESET", "CANCEL", and "SAVE".

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
ICAM	Identity, Credential, and Access Management
ID	Identification
MC	Managed Care
MCO	Managed Care Organization
MES	Medicaid Enterprise System
NPI	National Provider Identifier
PDF	Portable Document Format
PRN	Provider Network
PRSS	Provider Services Solution
UI	User Interface