Virginia MCO Portal User Guide

Medicaid Enterprise System (MES)

Release: 30.15

Release Date: 10/2025

Note: This user guide will continue to be updated to reflect new functionality or Changes.

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.

Table of Contents

I. Introduction and Overview

MCO clerks use this portal to minimize paper transactions between the state and their associated MCOs. This portal also plays a vital role in increasing the accuracy of decision-making between Provider Contracts and MCOs.

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

- Onboarding a provider into a contract with MCO.

- Managing the delegates of the MCO portal users.

II. Secure Home Page

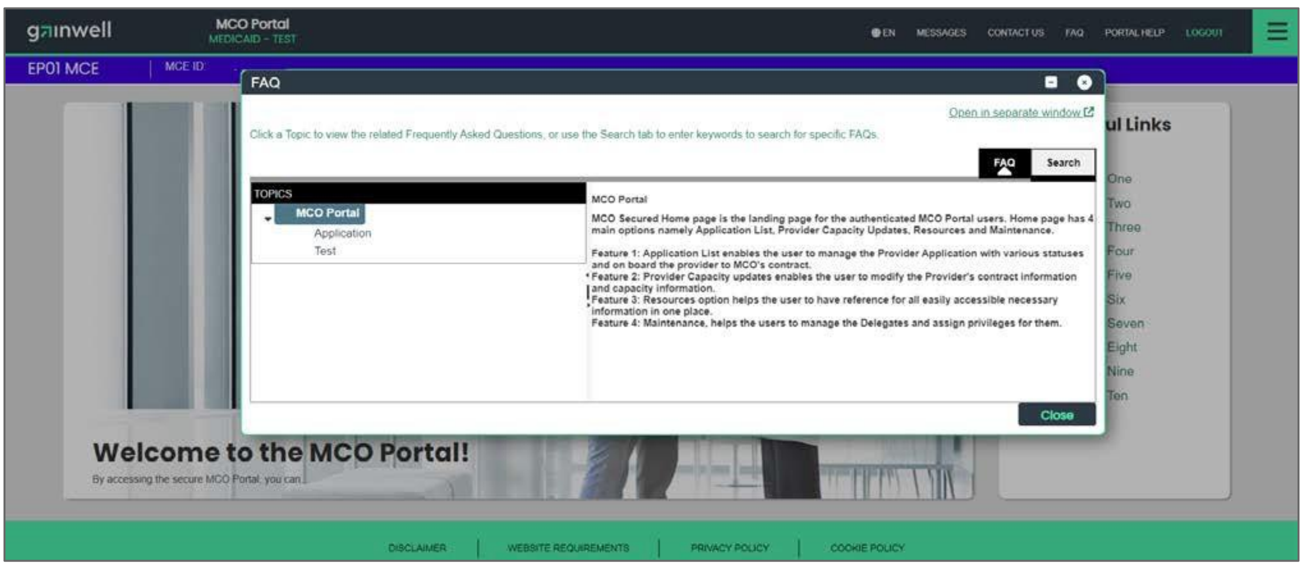
MCO clerks use this portal to minimize paper transactions between the provider and their associated MCOs. This portal also plays a vital role in increasing the accuracy of decision-making between provider contracts and MCOs.
This portal also allows primary users to reassign work assignments to delegates who work on behalf of primary users during their absence.

A secure home page enables authenticated MCO clerks to log in to the MCO Portal and perform business transactions. The system enables users to view the Contact Information for the state and communicate with the state via email.

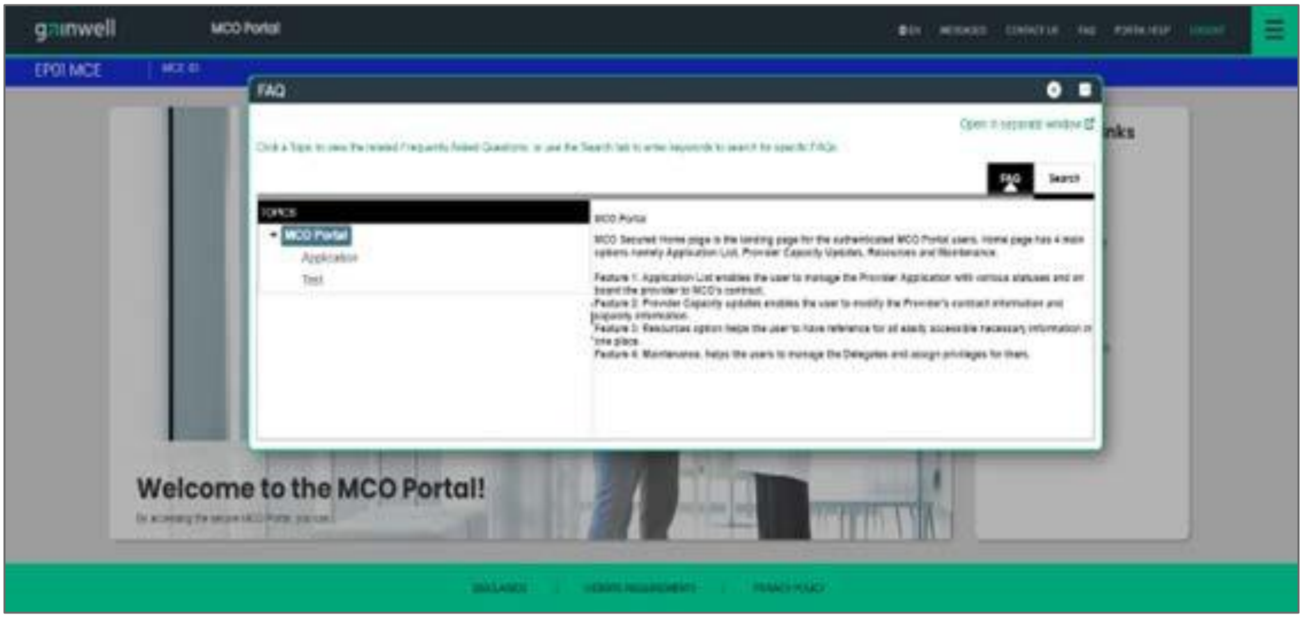
The Navigation Menu on the MCO Portal has six options:

Application List	Enables the user to manage the provider application with various statuses and on-boards the provider to the MCO contract.
My Account	Helps the user manage delegates and assign privileges for them. Delegates are secondary users who work on the behalf of primary users in their absence. For example, if an MCO clerk (who is a primary user of the MCO Portal) is not available to perform business operations in the portal, a delegate is assigned to perform some transactions.

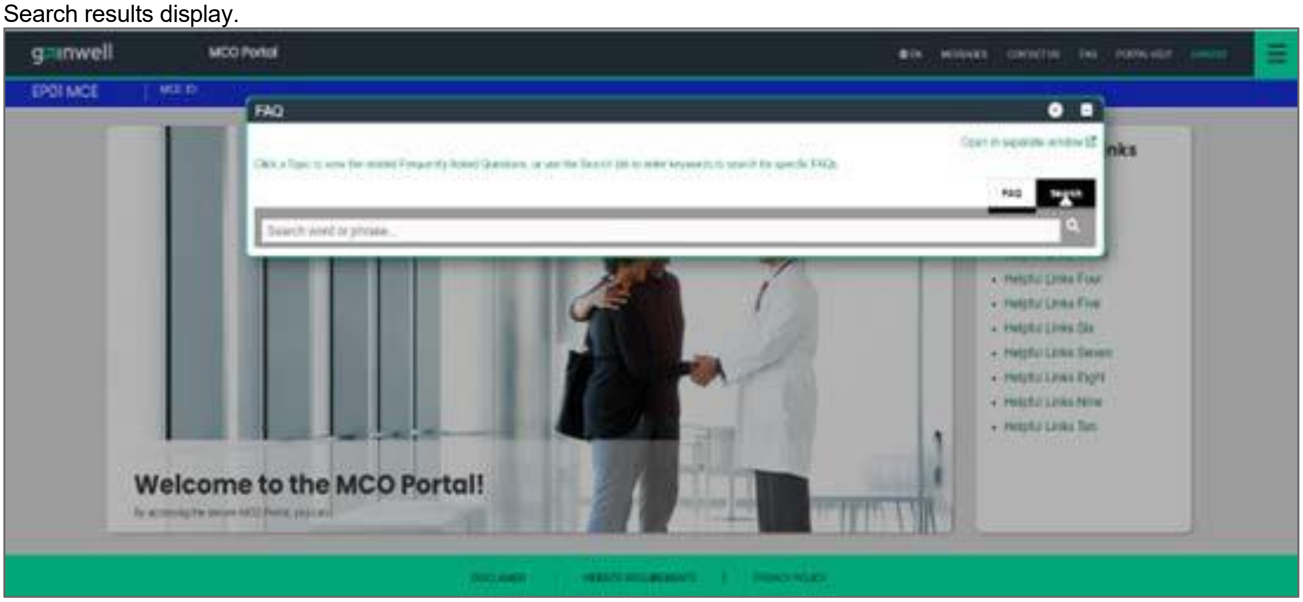
A. View FAQ



1. Click the **FAQ** tab from the **At a Glance Bar** menu to display the **FAQ** page.
2. Click **Search** from the FAQ window to perform a quick search. Enter the necessary data to perform the search.

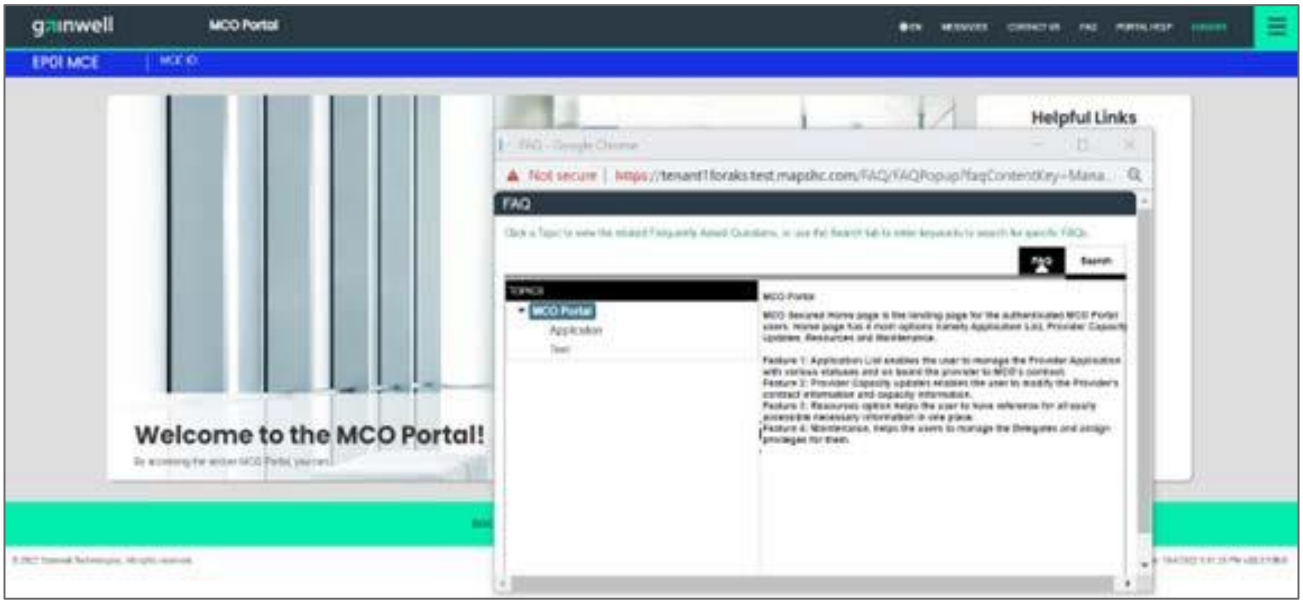


Search results display.



3. Click the minus icon (-) to collapse the panel.
4. Click the close icon (x) to close the **FAQ** panel.

1. View in a Separate Window



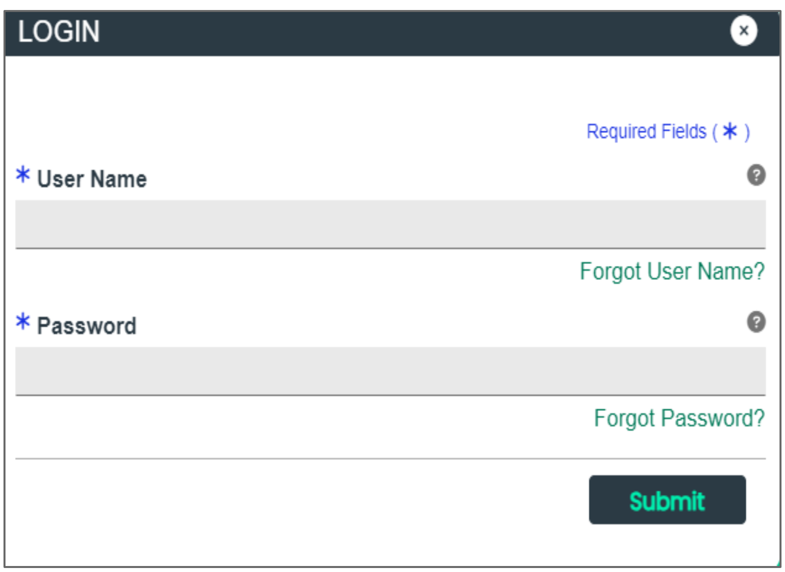
1. Click **Open in Separate Window** hyperlink on the top right corner of the **Contact Us** page.

NOTE: Depending on the browser being used, this page is detached from the application and can be moved around or, if applicable, moved to another screen. The page displays until it is closed, or the user logs out once it is detached.

2. Click the minus icon (-) to collapse the panel.

3. Click the close icon (x) to close the **FAQ** panel.

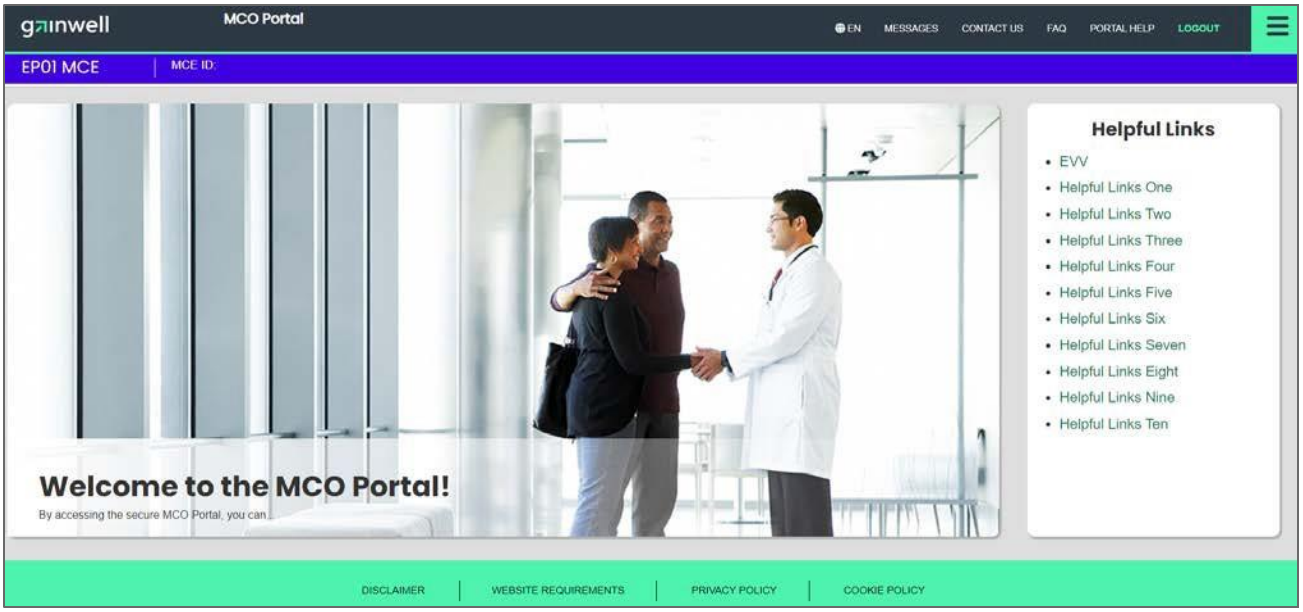
B. Navigating the System



1. Log into the system with assigned user ID and password.

2. Click **Submit**.

The Secure Home Page displays.



C. MCO Information Panel

The MCO Information Panel displays information about the Managed Care Organization. The panel displays on all pages in the MCO Portal when the user is the MCO.

D. Delegate Information Panel

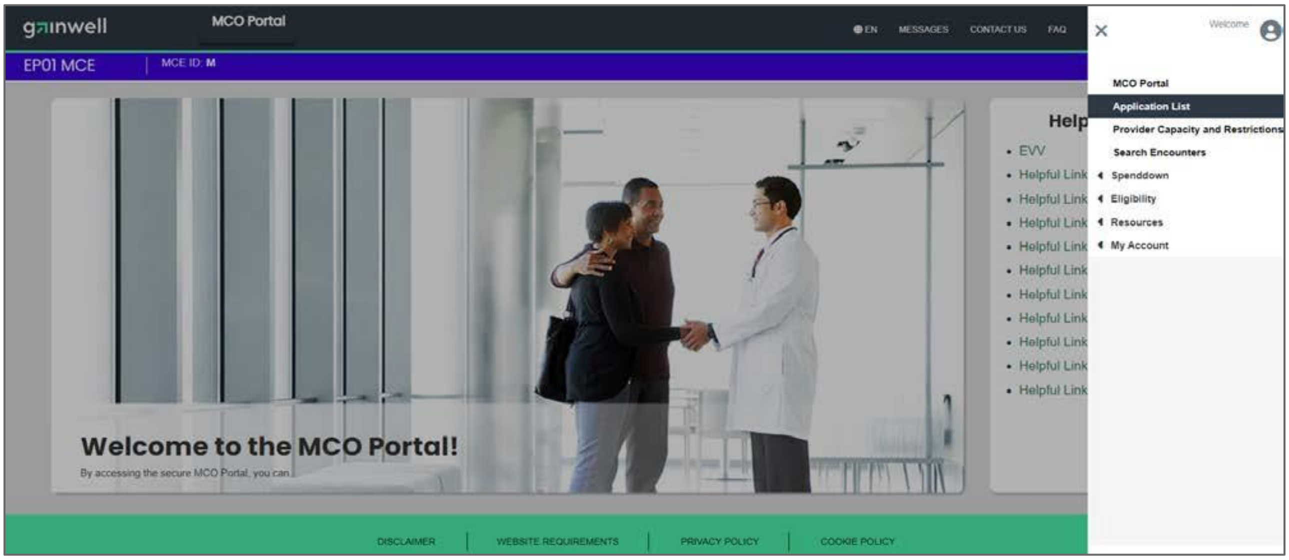
The Delegate Information Panel (DIP) displays information about the delegate and the MCO on whose behalf they are working. This panel displays on every main page when the user is an MCO Delegate.

E. Navigation Menu

The navigation menu provides easy access to all available areas of the MCO Portal. The navigation menu is accessible by clicking the **Hamburger** icon on the MCO Portal home page. Users can hover their mouse over the navigation menu topics to reveal sub-menus.

III. Application List

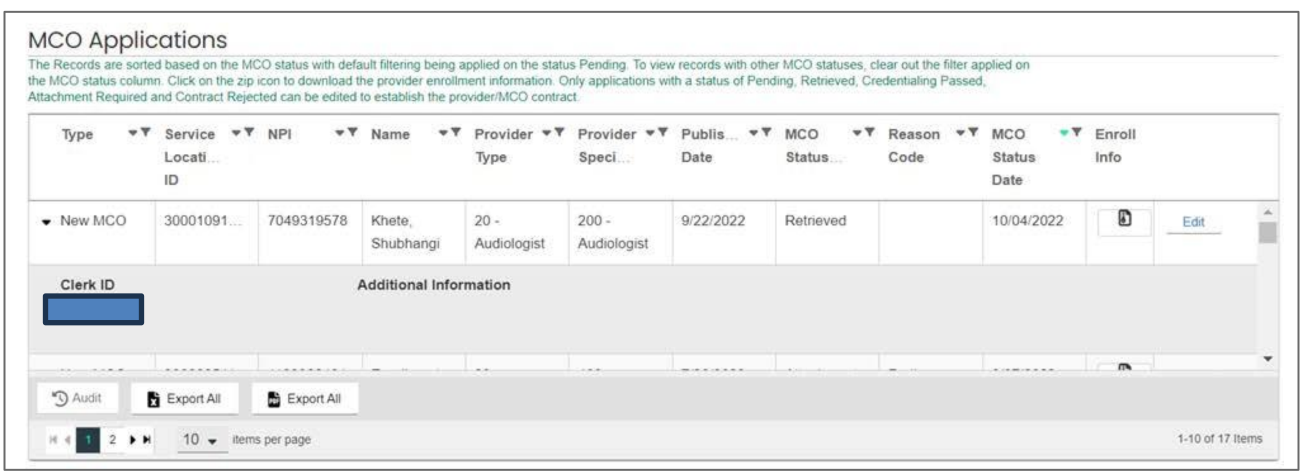
Provider application maintenance is one of the primary business transactions performed by MCO clerks. MCO clerks have a list of applications from providers who are already a part of the State Medicaid Program but do not yet have a contract with an MCO. The initial provider's MCO status is **Pending**.



1. Click the **Hamburger** icon on the home page and select or hover over the **Application List** menu option.

I. Downloading Provider Enrollment Information

Records are sorted based on the MCO status.



2. Click the **ZIP Icon** by the specific record under the **Enroll Info** column to download the provider's enrollment information.

The **MCO Status** column is automatically updated to **Retrieved when the ZIP is successfully downloaded**. Additionally, the **MCO Status Date** column is initialized with the date on which the status changed.

The following provide details on the **Application List** page display:

- Type (Enrollment Type)
- Type (Enrollment Type)
- Service Location ID
- NPI
- Name
- Provider Type
- Provider Specialty
- Publish Date
- MCO Status
- Reason Code
- MCO Status Date
- Enroll Info (Zip file with Provider Enrollment details)
- Clerk ID and Additional Information (Zip file containing any additional file shared by the provider through the secured Provider Portal)

3. Click the caret icon on the left of the Type column in the Application List results grid to view the Clerk ID and Additional Information about the provider's application. This will expand the application list information to display a second row, which contains the Clerk ID and Additional Information columns.

II. Tracking Status Changes in Provider Records

Tracking status changes enables the user to onboard a provider to an MCO, track various statuses of the Provider application, and then verify or credential the provider data.

Users can update the MCO Status of the provider from **Retrieved** to one of the following:

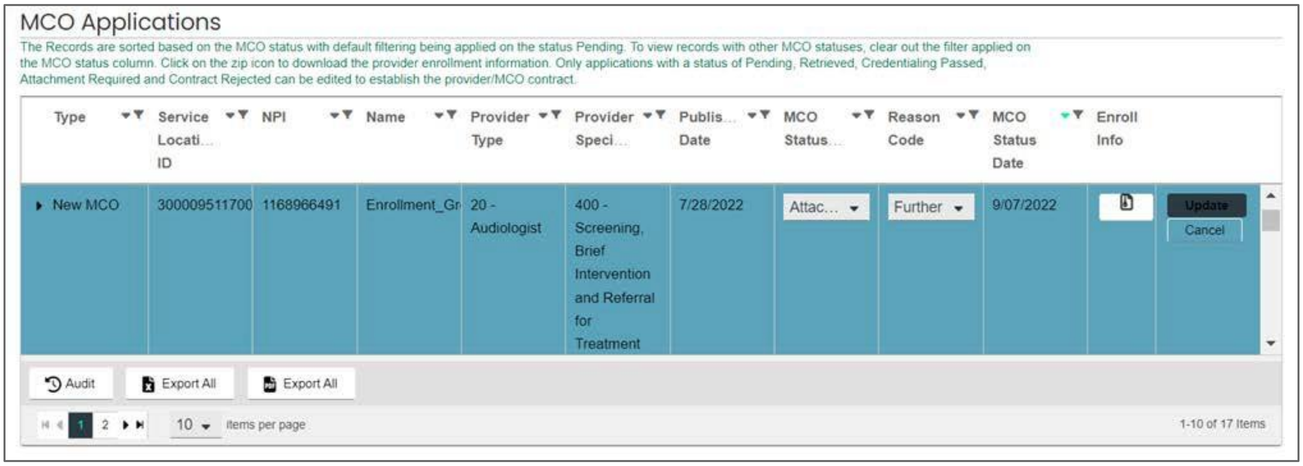
- Attachment Required
- Credentialing Passed - The provider record can only be considered for a contract decision when the MCO status is **Credentialing Passed.**
- Credentialing Failed
- Provider Declined

Decisions on provider records are based on the evaluation performed by the MCO clerk. When the provider credentialing fails, or the provider is declined, the MCO ignores the respective provider record, and the status should be set to **Credentialing Failed** or **Provider Declined** as appropriate. If the MCO needs additional documentation from the provider, the status is set to **Attachment Required**.

1. MCO Status Columns

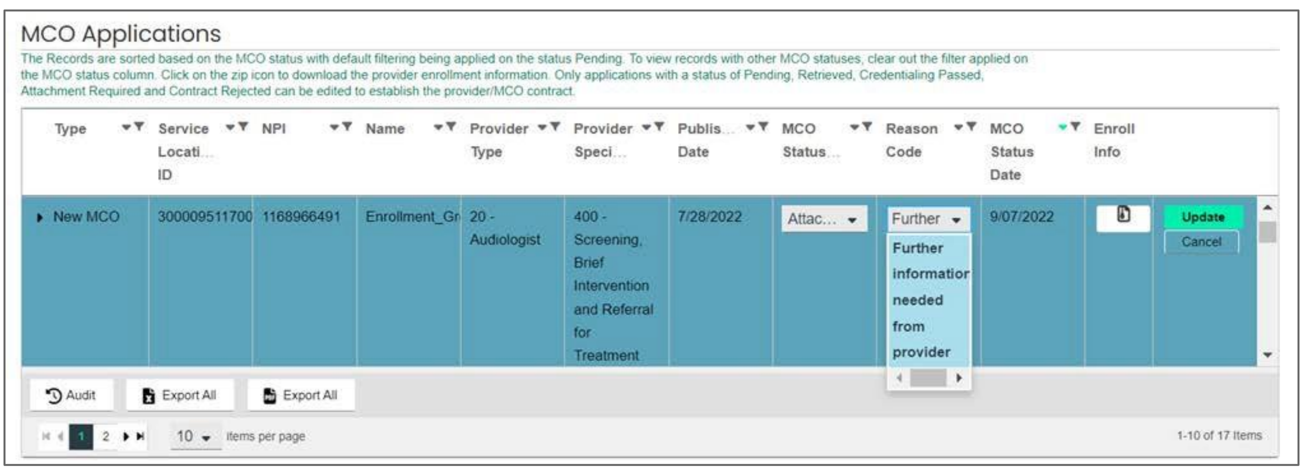
When provider records are determined to be accurate, select the MCO Status column with the **Contract Accepted** value and the valid **Reason Code** associated with that value. The provider is on-boarded to the MCO Program within a specific network(s).

If there are reservations about accepting the contract on the provider record, select the MCO status column with the **Contract Rejected** value and the valid **Reason Code associated with that value**. The Provider Contract is not created with the respective MCO.



NOTE: To update the MCO Status of a provider record, the status of the record must be either **Retrieved**, **Attachment Added**, or **Credentialing Passed**.

1. Click the **Edit** button. This enables the drop-down menu in the **MCO Status** column to display.
2. Select the desired MCO status from the dropdown.

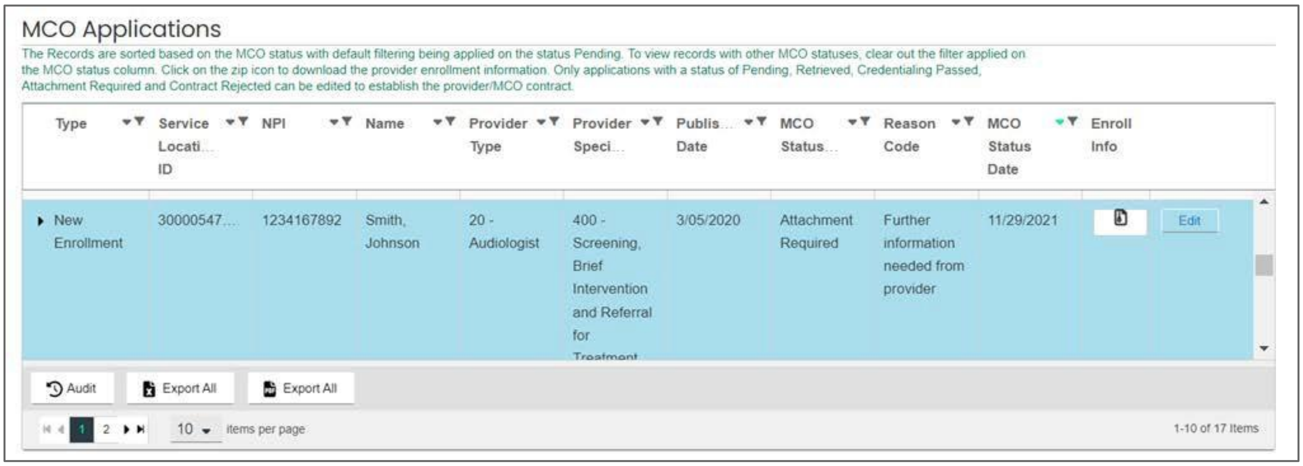


3. Click **Update** to change the status or click **Cancel** to retain the existing status.

NOTE: Whenever the **MCO Status** is updated, the user needs to show the **Reason Code** associated with each MCO status.

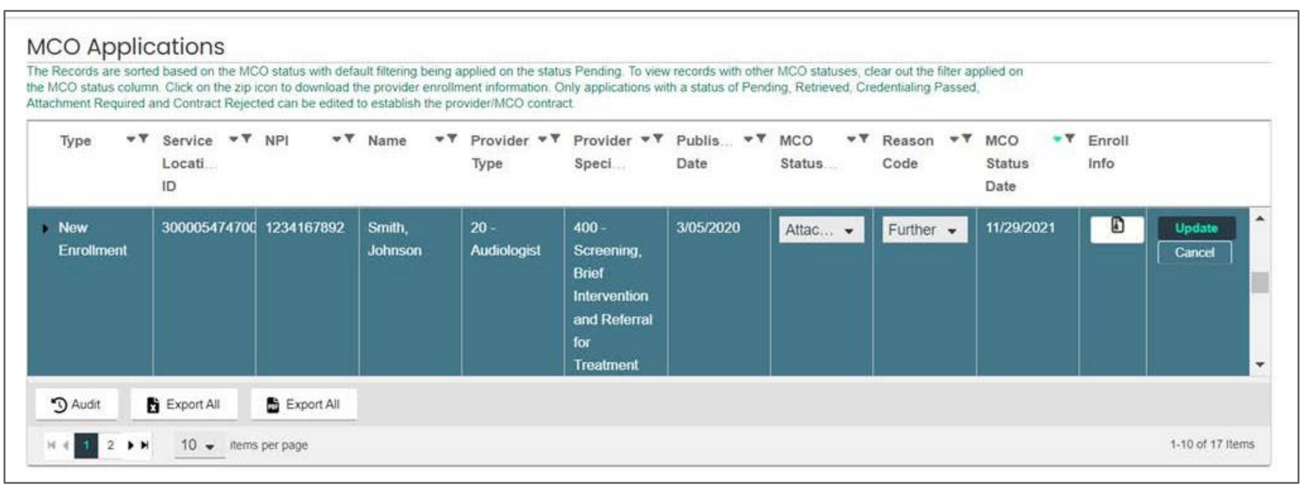
III.Requesting Provider to Submit Additional Document.

The MCO clerk verifies the provider submitted a document. If any additional documents are required from the provider, the MCO status updates to **Attachment Required**.



1. Click the **Edit** button and update the MCO status to **Attachment Required** when additional documents are required from the provider.

2. Update the **Reason Code**. This makes the attachment option required.

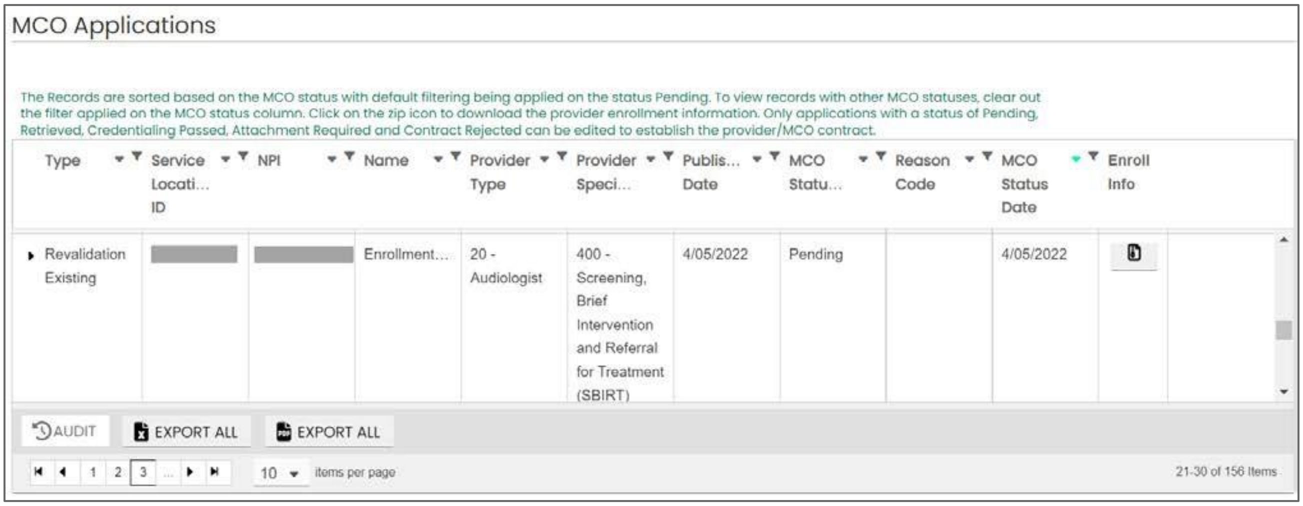


3. Click **Update** to save or click **Cancel** to retain the existing status.

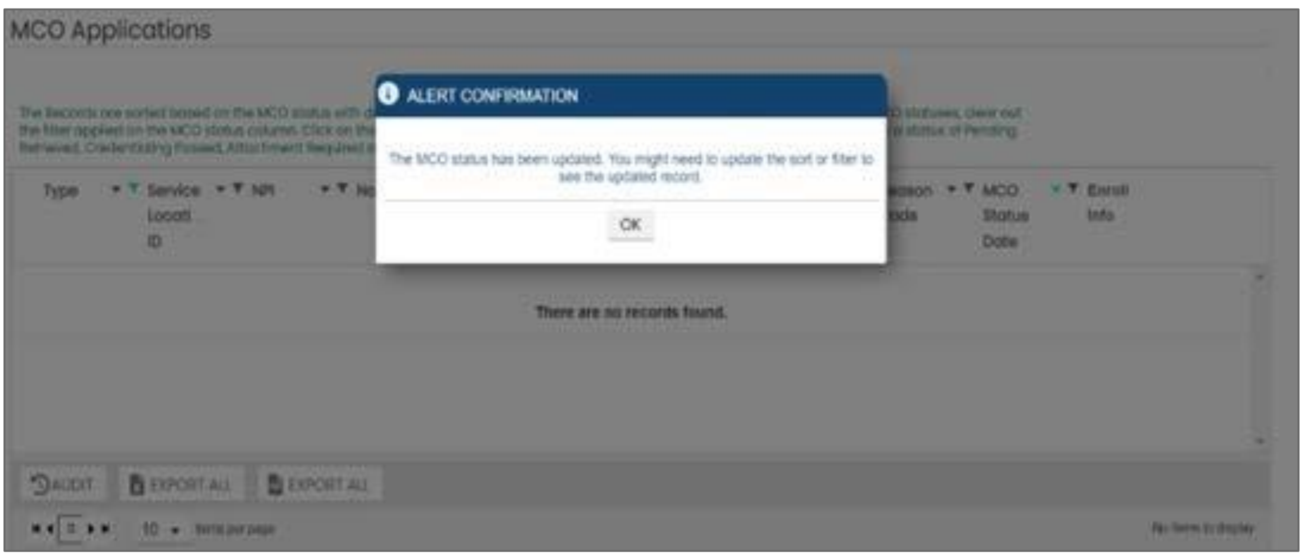
NOTE: The MCO status changes back to **Attachment Added** once the provider uploads the document. The consolidated ZIP file is then available under the **Additional information** column. Once the documents are received from the provider, the MCO clerk can update the MCO status.

IV. Revalidating Providers with Existing MCO Participation:

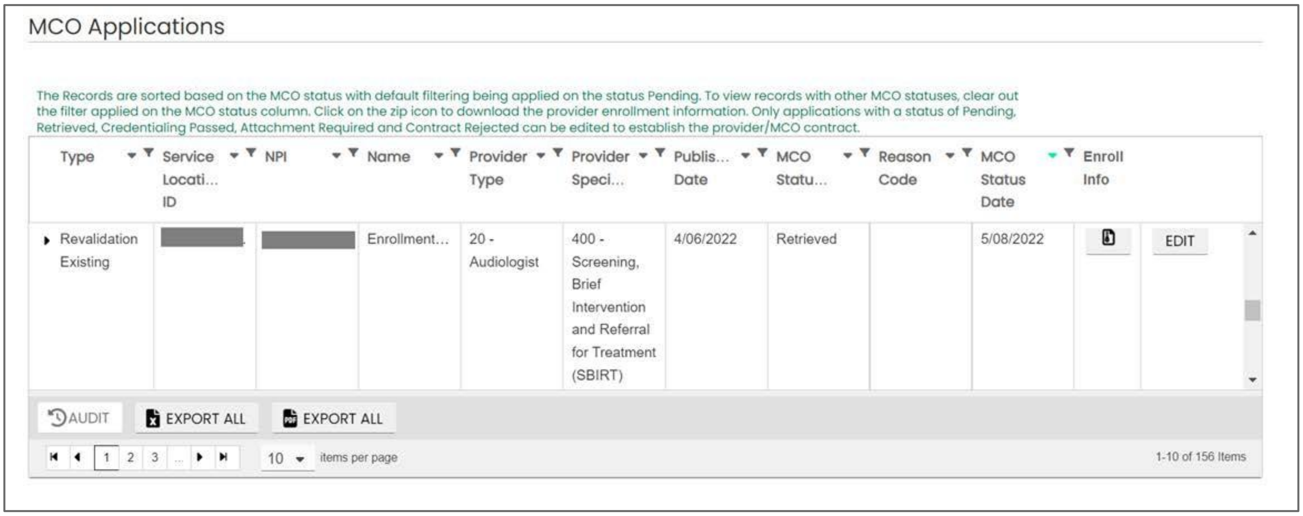
When the provider is revalidating and has an existing participation with an MCO, a new application is displayed on the MCO Portal Application List with a type of **Revalidation Existing** for this MCO.



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



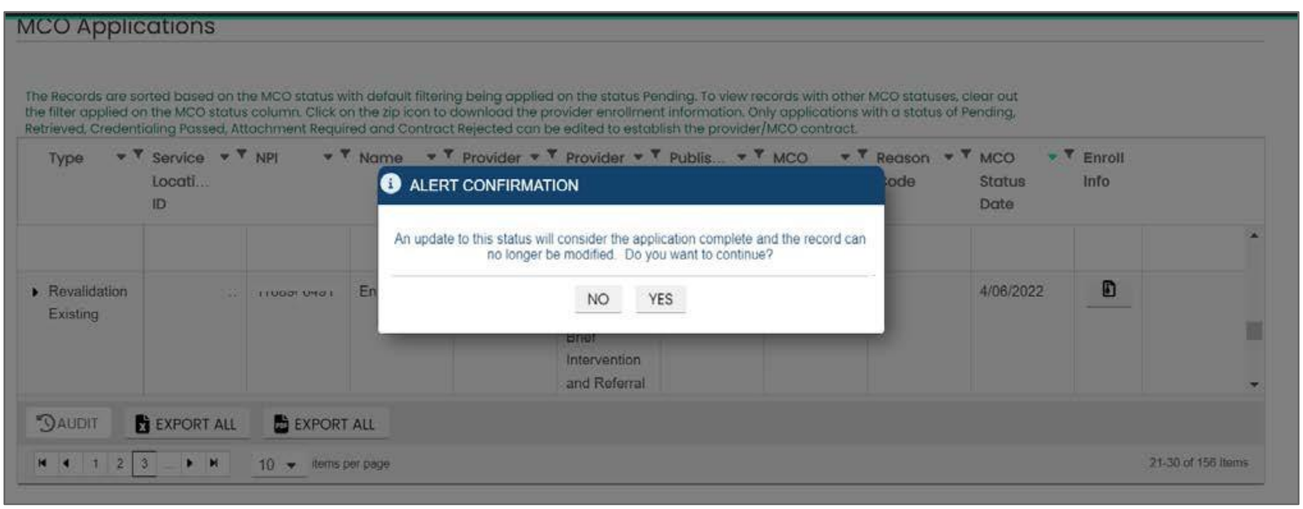
2. Click **OK** when the **ALERT CONFIRMATION** message displays.



> **NOTE:** The MCO status is updated to **Retrieved** once the ZIP file is successfully downloaded. Application setting configuration will determine which statuses will display for the Revalidation of Existing applications on the MCO Portal Application List.

Clients can configure the statuses for the Revalidation Existing application types to include Acknowledged only or to contain all the other statuses (Attachment Required, Credentialing Passed, Credentialing Failed, Provider Declined, Contract Rejected, and Contract Accepted) that a new MCO application has. Depending on the application setting, a user can update the Revalidation Existing application status accordingly.

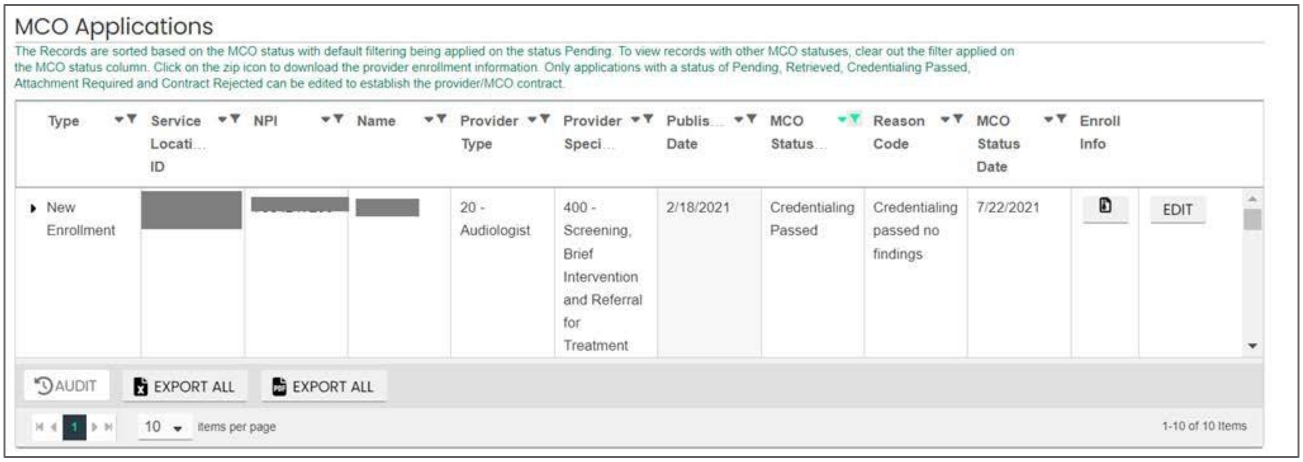
3. Verify downloaded documents and then update the MCO status to **Acknowledged**.
4. Select the **Reason Code**. This is the final status of the application.



5. Click **YES** when the **ALERT CONFIRMATION** message displays.

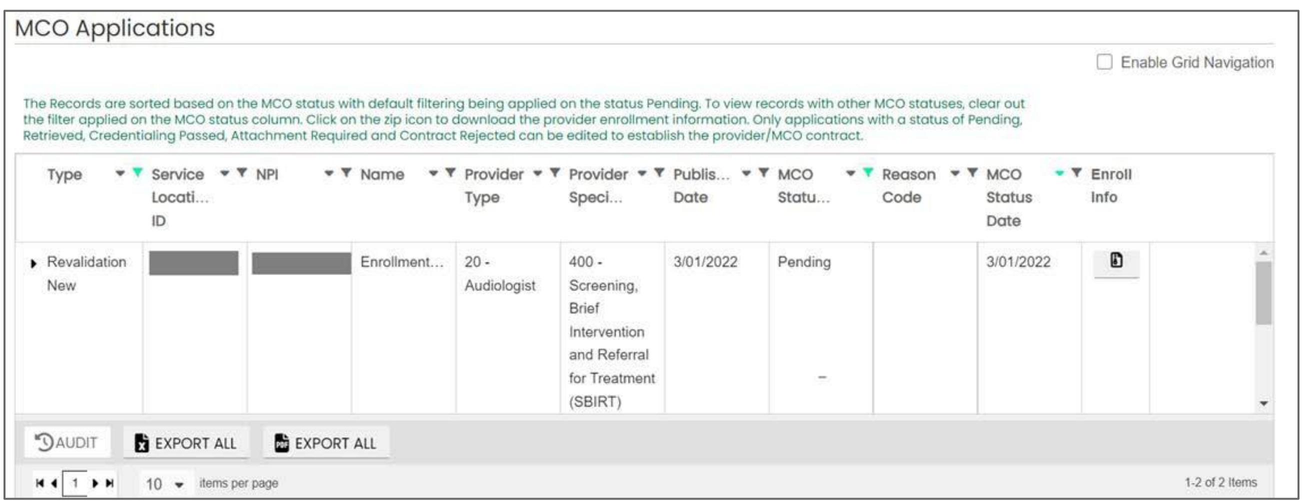
2. Credentialing Details

Decisions on provider records are based on the evaluation performed by the MCO clerk. When the provider's credential fails, the provider is declined, or the contract is rejected. The MCO clerk updates the status to be set to **Credentialing Failed, Provider Declined, or Contract Rejected** as appropriate. These statues are the final status for Revalidation Existing applications and the MCO participation within Managed Care will be end-dated based on the MCO Status Date and the provider contracts within Provider Management and the Provider MCO.

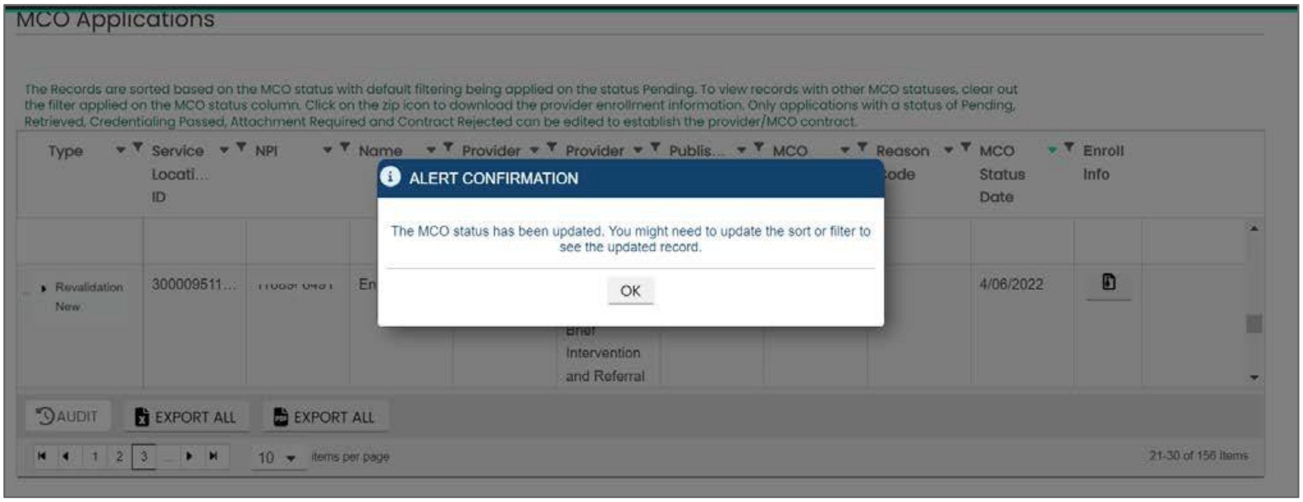


V. Revalidating Providers with New MCO Participation:

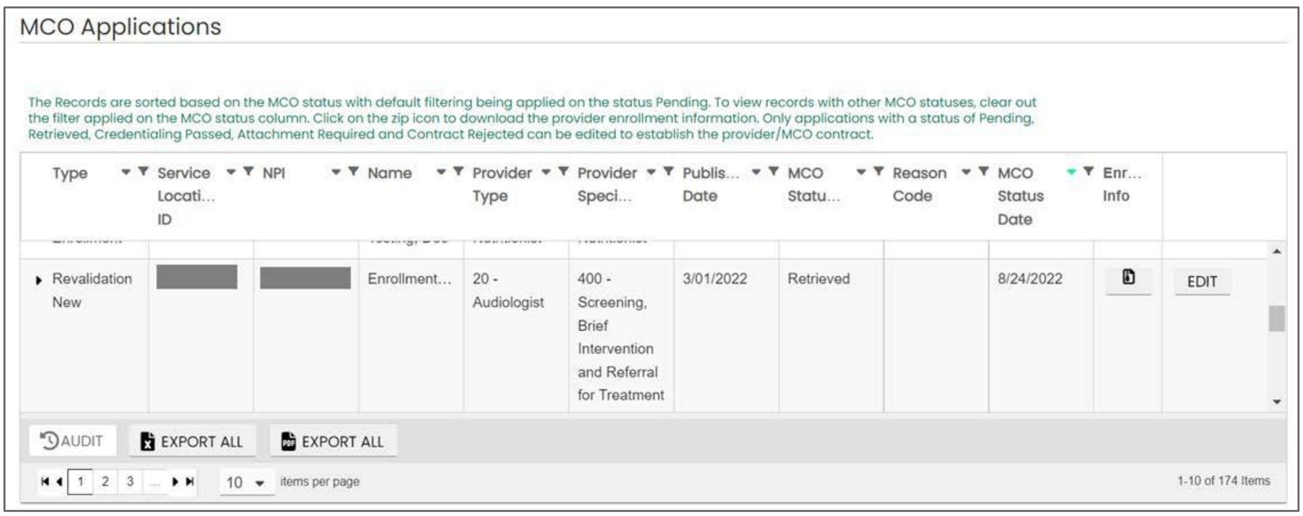
When the provider is revalidating and selects an MCO participant without an existing participation with that MCO, a new application displays on the MCO Portal Application List with a type of **Revalidation New** for this MCO.



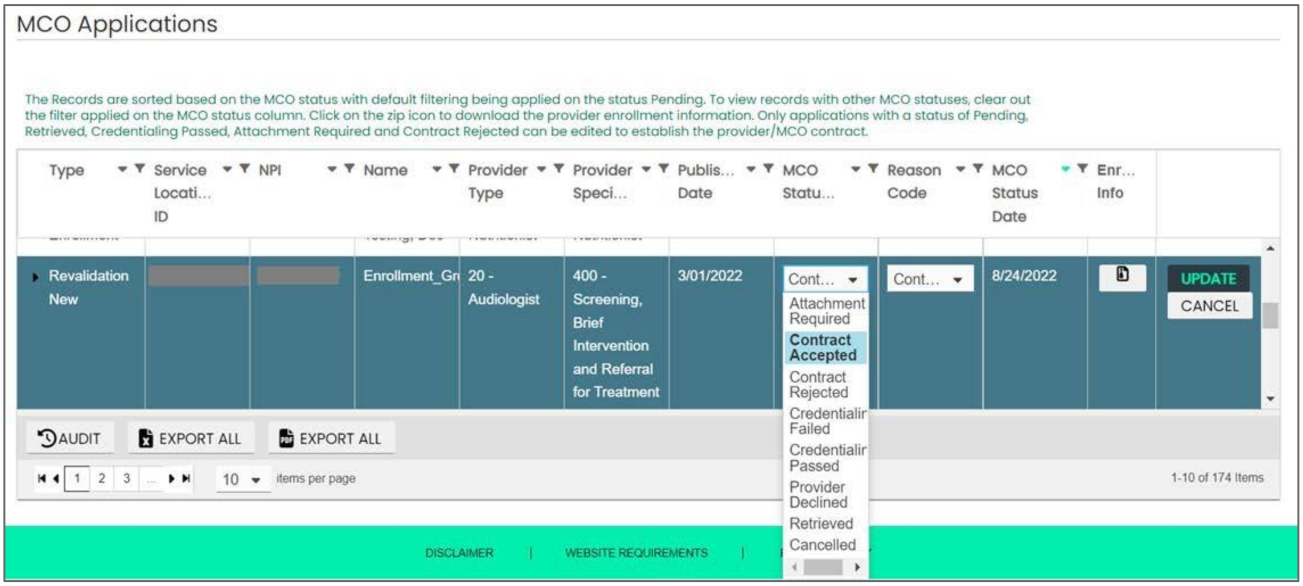
1. Click the **ZIP Icon** under the **Enroll Info** column to download documents uploaded by the provider during revalidation.



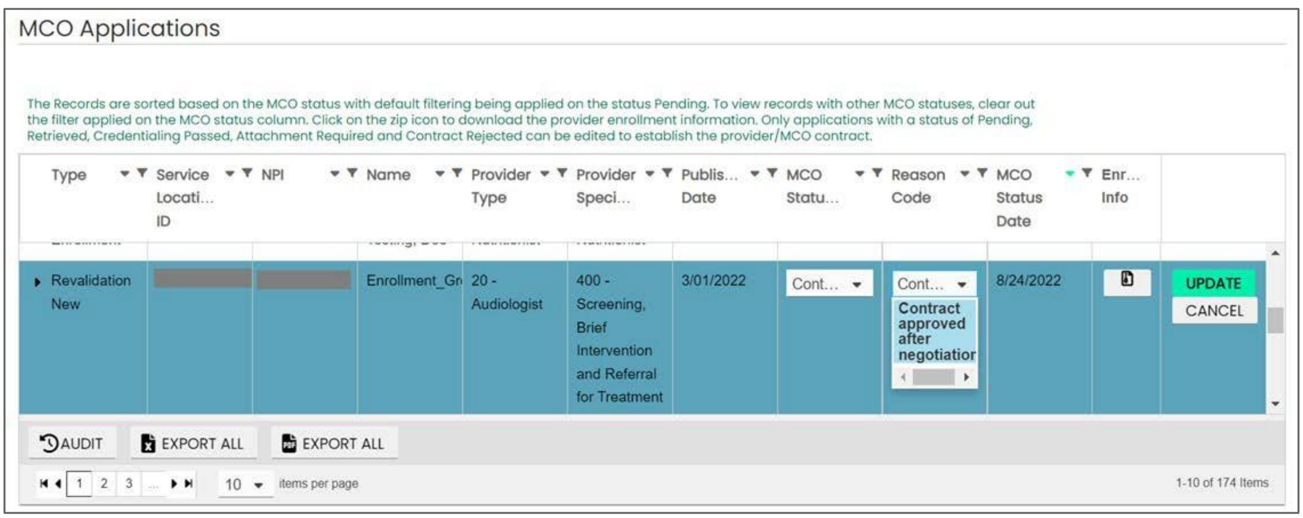
2. Click **OK** when the **ALERT CONFIRMATION** message displays.



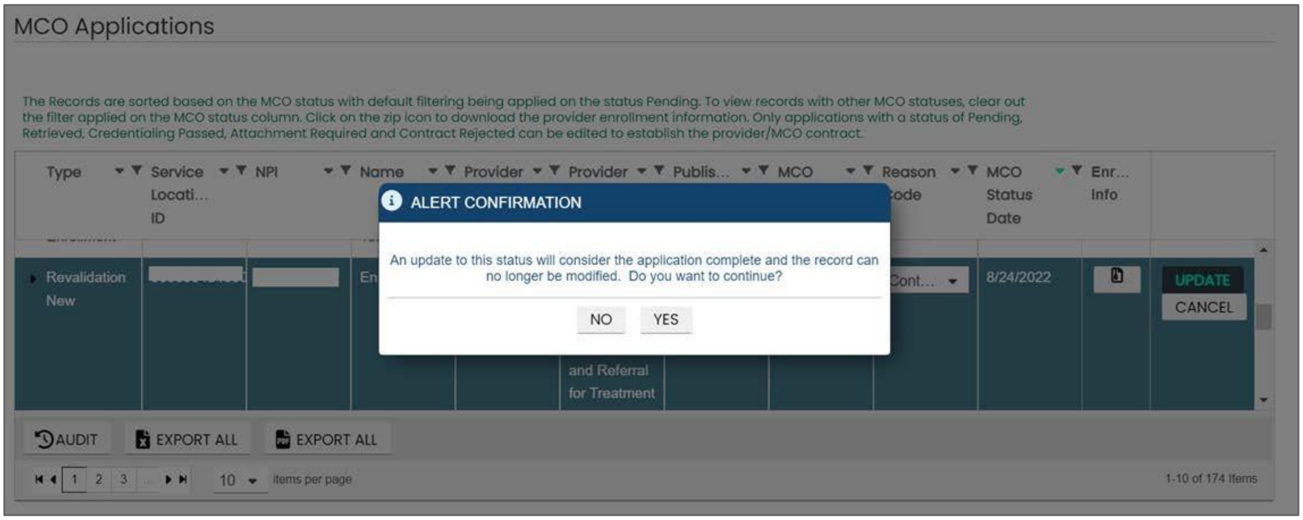
NOTE: The MCO status is updated to **Retrieved** once the ZIP file is successfully downloaded.



3. Verify downloaded documents and update the **MCO Status** as appropriate.



4. Select the **Reason Code**.



5. Click **YES** when the **ALERT CONFIRMATION** message displays.

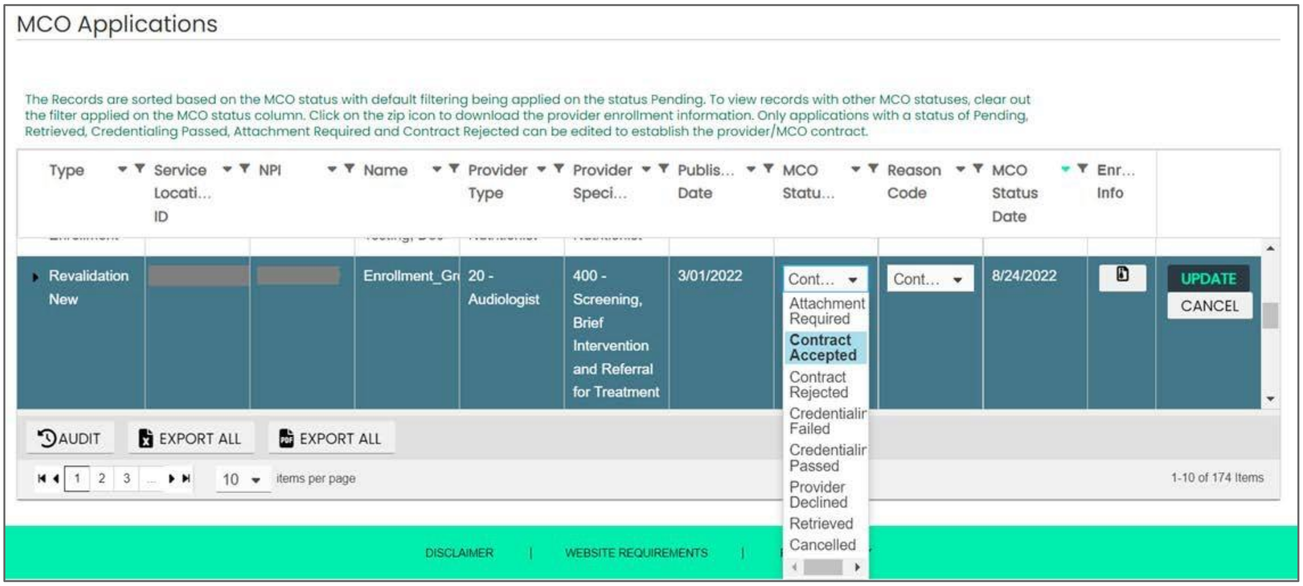
VI. Establishing Contract Dates for Provider Service Location

Service location decisions are made on provider records based on the evaluation performed by the MCO clerk. When the provider credentialing fails or the provider is declined, the MCO ignores the respective provider record. The provider record can only be considered for a contract decision when the MCO status is Credentialing Passed.

Users can add the following details of providers who are contracted with the MCO:

- Contract Start Date
- Contract End Date

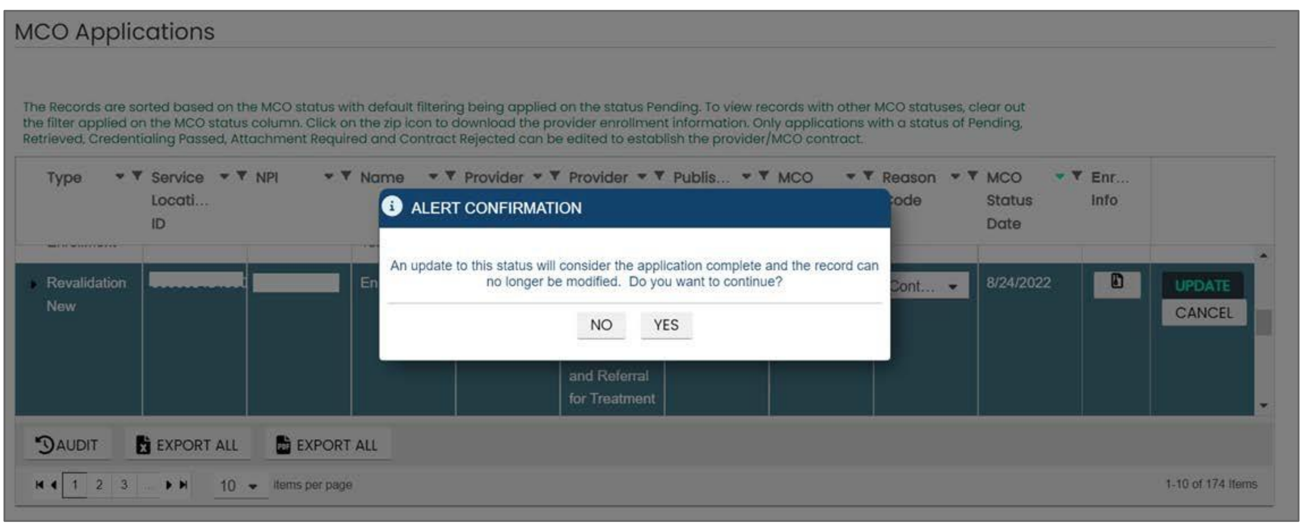
NOTE: When the user enrolls with any other MC through the Provider Portal, the application is received through the MCO Portal as New MCO.



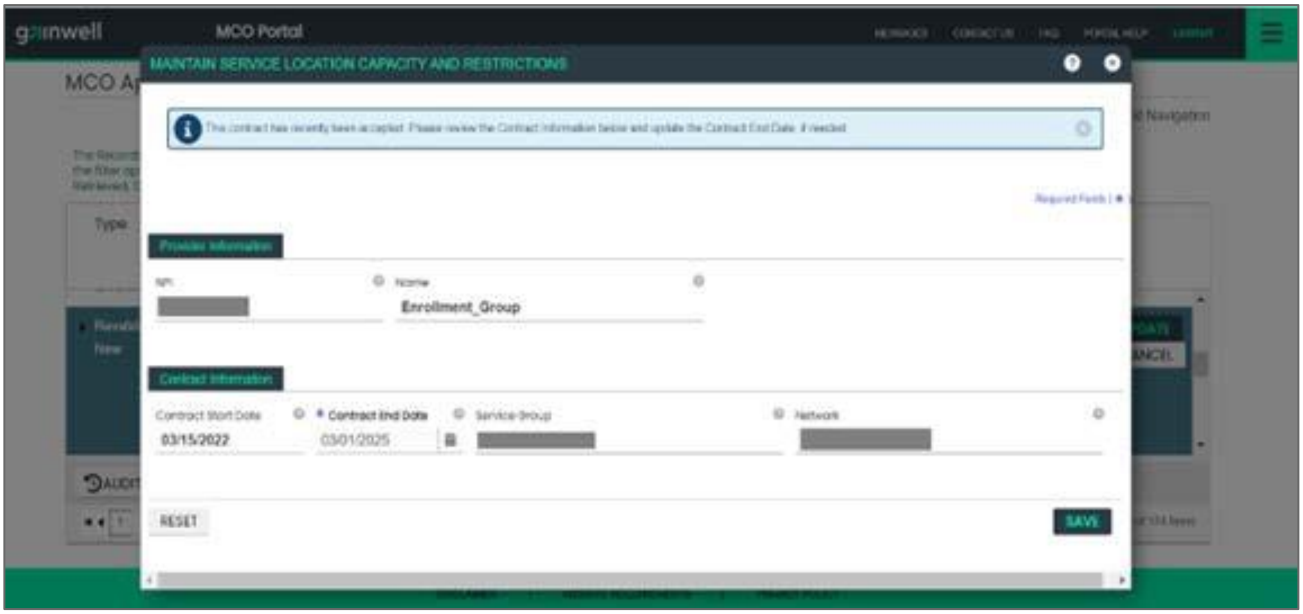
1. Select **Contract Accepted** from the MCO Status drop-down menu for the selected provider record in the Application List grid.

2. Click **UPDATE**.

NOTE: When the **OK** button is clicked, records in the Application List grid are resorted based on the MCO status.



3. Click **YES** when the **ALERT CONFIRMATION** message displays to view the **Maintain Service Location Capacity** and **Restrictions** panel.



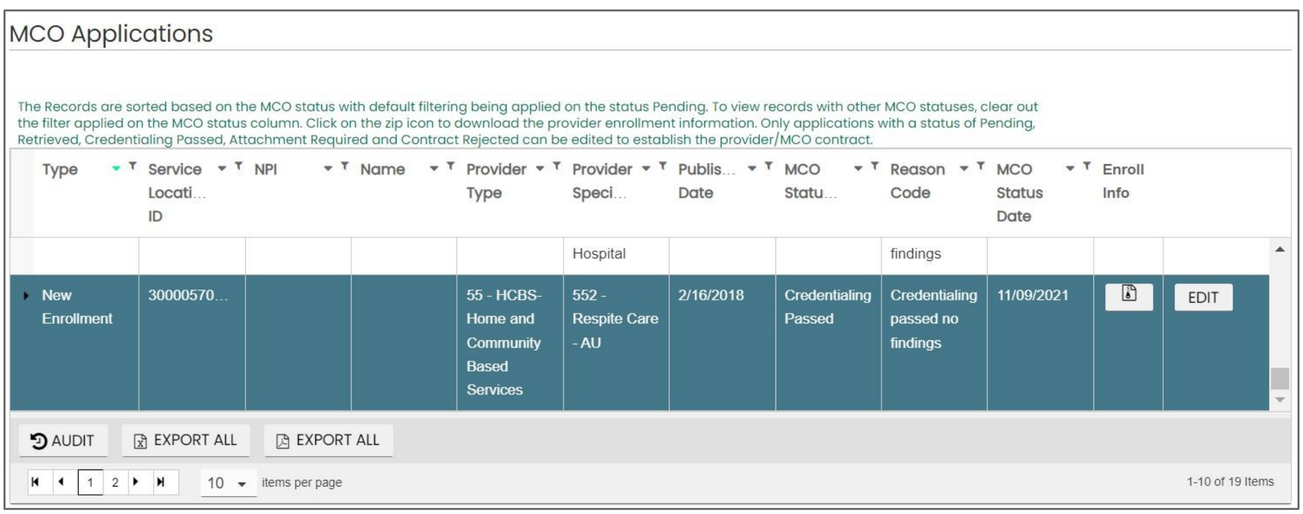
4. Enter the provider's **Contract Start Date** and **Contract End Date** for this network.

5. Click **SAVE** to store the record. It redirects back to the application list page.

NOTE: Users can update the **Contract End Date** field or close the overlay when a message is successfully saved.

B. Exporting Records to PDF or Excel

Users can export Application List records to a PDF or Excel document.



1. Select the desired pagination value from the **Items per page** drop-down.

2. Click **EXPORT ALL EXCEL** or **EXPORT ALL PDF**.

NOTE: The application list data is exported and displayed in a PDF or Excel document based on the current sort/filter criteria selected by the user. If no filter criteria are selected, all application list data will be exported and displayed. When users apply a filter, only the filtered grid details of the current page are downloaded.
Users can filter columns using **Equal to**, **Contains**, **Starts with**, and **Ends with** options.

The following is an example of exporting records to Excel, and a PDF document.

(a) Excel Export

A1 Type

	A	B	C	D	E	F	G	H	I	J	K
1	**Type**	**Service Location ID**	**NPI**	**Name**	**Provider Type**	**Provider Specialty**	**Published Date**	**MCO Status**	**Reason Code**	**MCO Status Date**	**Clerk ID**
2	New MCO	[redacted]	[redacted]	[redacted]	20 - Audiologist	200-Audiologist	09/22/2022	Retrieved		10/04/2022	ep01mc01
3	New MCO	[redacted]	[redacted]	[redacted]	20 - Audiologist	400-Screening, Brief Intervention and Referral for Treatment (SBIRT)	07/28/2022	Attachment Required	Further information needed from provider	09/07/2022	ep01mc01
4	New MCO	[redacted]	[redacted]	[redacted]	25 - DME-Medical Supply Dealer	250-DME/Medical Supply Dealer	11/30/2021	Retrieved	Contract Reset to Retrieved	06/21/2022	ep01mc01
5	New Enrollment	[redacted]	[redacted]	[redacted]	20 - Audiologist	400-Screening, Brief Intervention and Referral for Treatment (SBIRT)	02/18/2021	Attachment Required	Further information needed from provider	12/16/2021	ep01mc10
6	New Enrollment	[redacted]	[redacted]	[redacted]	20 - Audiologist	400-Screening, Brief Intervention and Referral for Treatment (SBIRT)	03/05/2020	Attachment Required	Further information needed from provider	11/29/2021	ep01mc01
7	New Enrollment	[redacted]		[redacted]	55 - HCBS-Home and Community Based Services	552-Respite Care - AU	02/16/2018	Credentialing Passed	Credentialing passed no findings	11/09/2021	ep01mc10
8	New Enrollment	[redacted]		[redacted]	55 - HCBS-Home and Community Based Services	552-Respite Care - AU	02/16/2018	Credentialing Passed	Credentialing passed no findings	11/09/2021	ep01mc10

PDF Export

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MCO Applications Page: 1 of 4

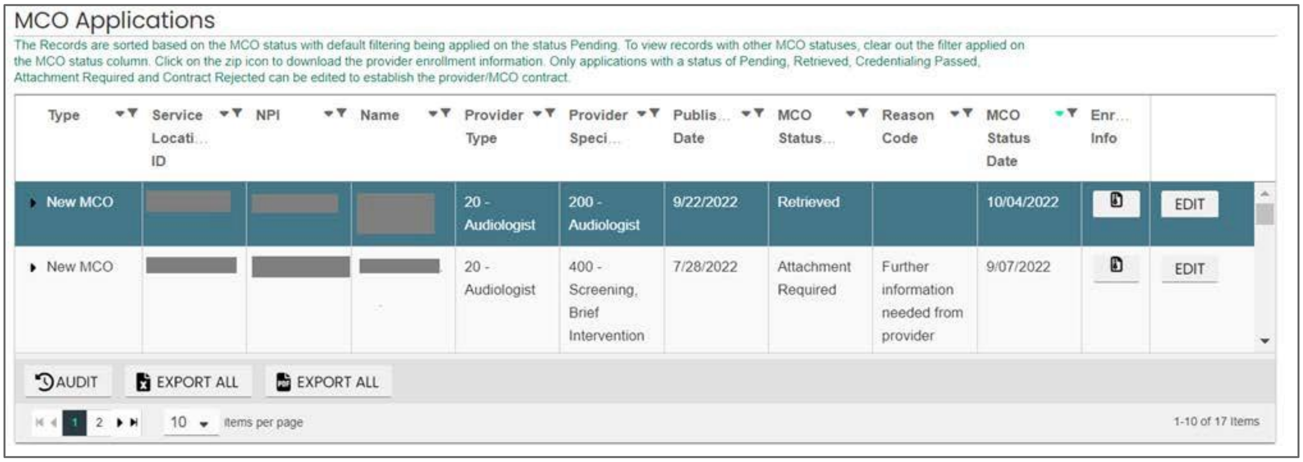
Type	Service Location ID	NPI	Name	Provider Type	Provider Specialty	Published Date	MCO Status	Reason Code	MCO Status Date	Clerk ID
New MCO	[redacted]	[redacted]	[redacted]	20 - Audiologist	200 Audiologist	09/22/2022	Retrieved		10/04/2022	ep01mc01
New MCO	[redacted]	[redacted]	[redacted]	20 - Audiologist	400-Screening, Brief Intervention and Referral for Treatment (SBIRT)	07/28/2022	Attachment Required	Further information needed from provider	09/07/2022	ep01mc01
New MCO	[redacted]	[redacted]	[redacted]	25 - DME-Medical Supply Dealer	250-DME/Medical Supply Dealer	11/30/2021	Retrieved	Contract Reset to Retrieved	06/21/2022	ep01mc01
New Enrollment	[redacted]	[redacted]	[redacted]	20 - Audiologist	400-Screening, Brief Intervention and Referral for Treatment (SBIRT)	02/18/2021	Attachment Required	Further information needed from provider	12/16/2021	ep01mc10
New Enrollment	[redacted]	[redacted]	[redacted]	20 - Audiologist	400-Screening, Brief Intervention and Referral for Treatment (SBIRT)	03/05/2020	Attachment Required	Further information needed from provider	11/29/2021	ep01mc01

Run Date/Time: 10/4/2022 8:46:49 PM EST

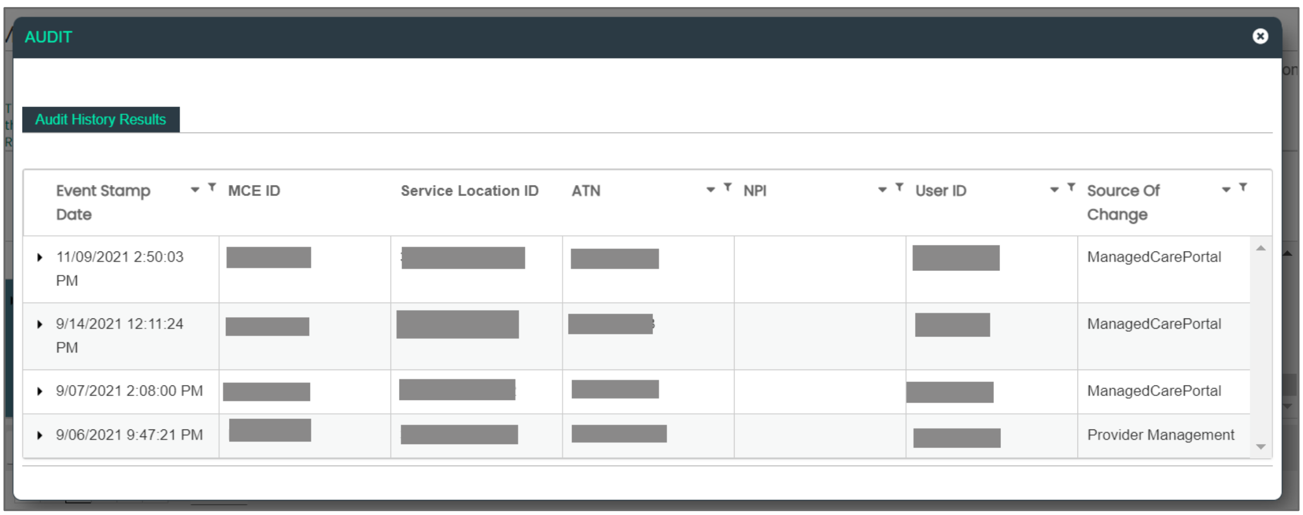
NOTE: Users can see the date/runtime in the filename when data is exported to an Excel document. For example, UTC time displays in a YYYYMMDDTHHMM (year/month/day/time/hour/minutes) timestamp format. The following example displays how users can create filenames with this timestamp format.

Example: MCO_Application_List_20200822T1305

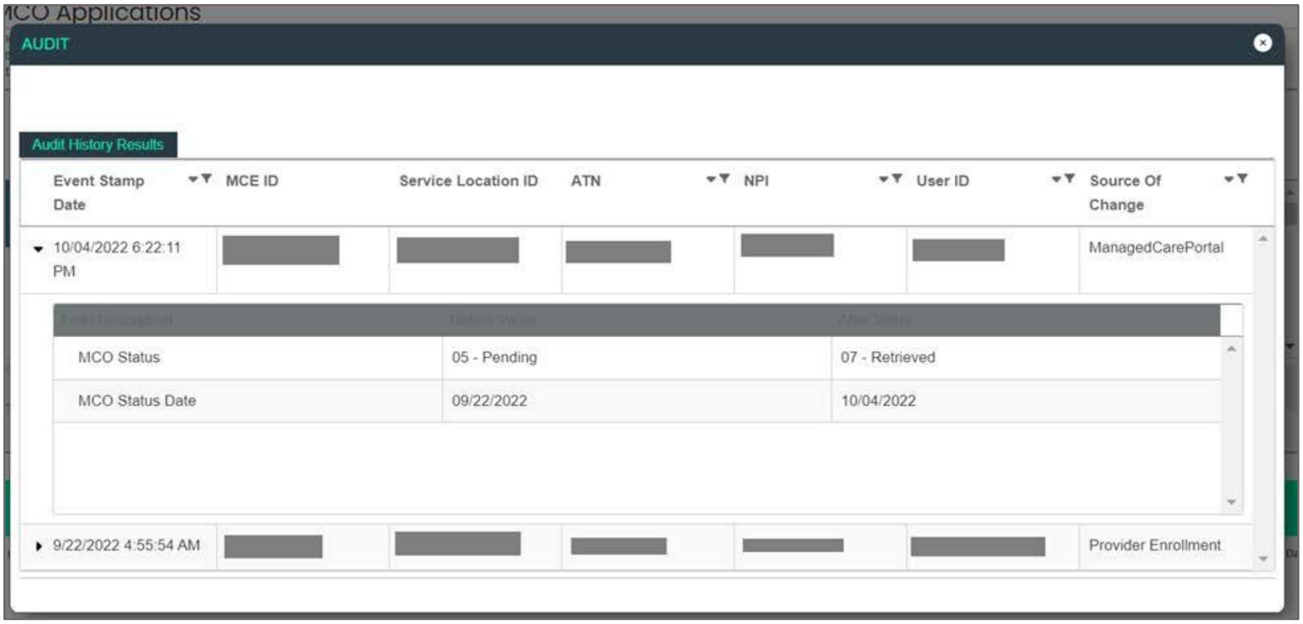
C. Audit Information:



1. Select a record from the application list grid to enable the **AUDIT** icon.
2. Click the **AUDIT** icon to view information.



3. Click the arrow to expand Audit History Results.

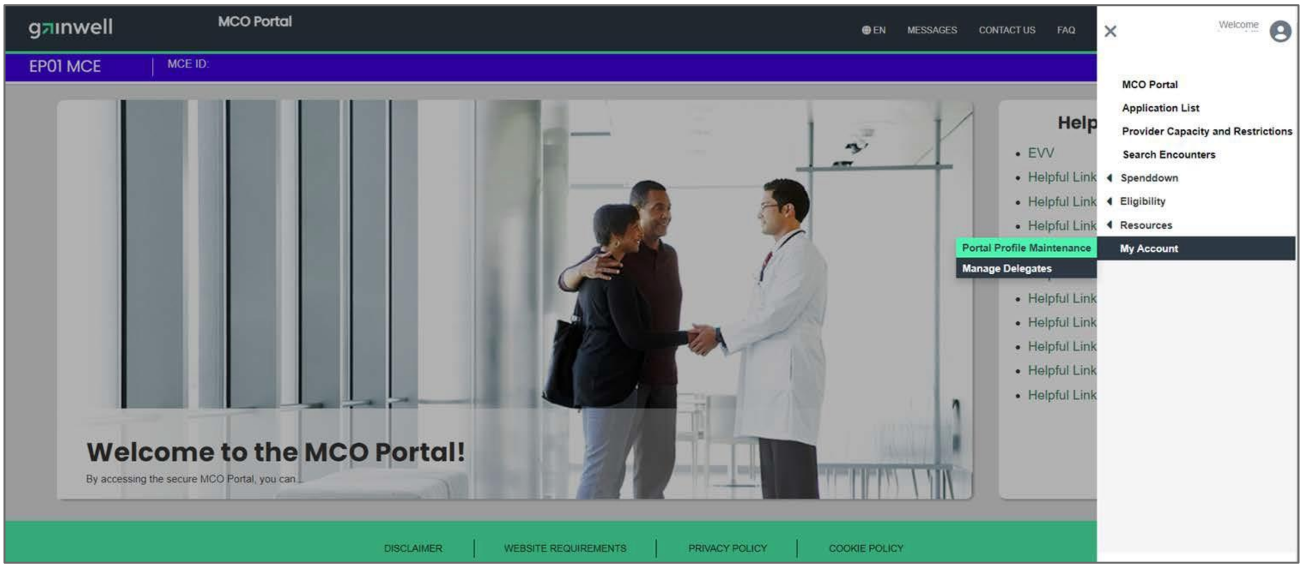


4. Click the **X** to close the Audit window and return to the application list page.

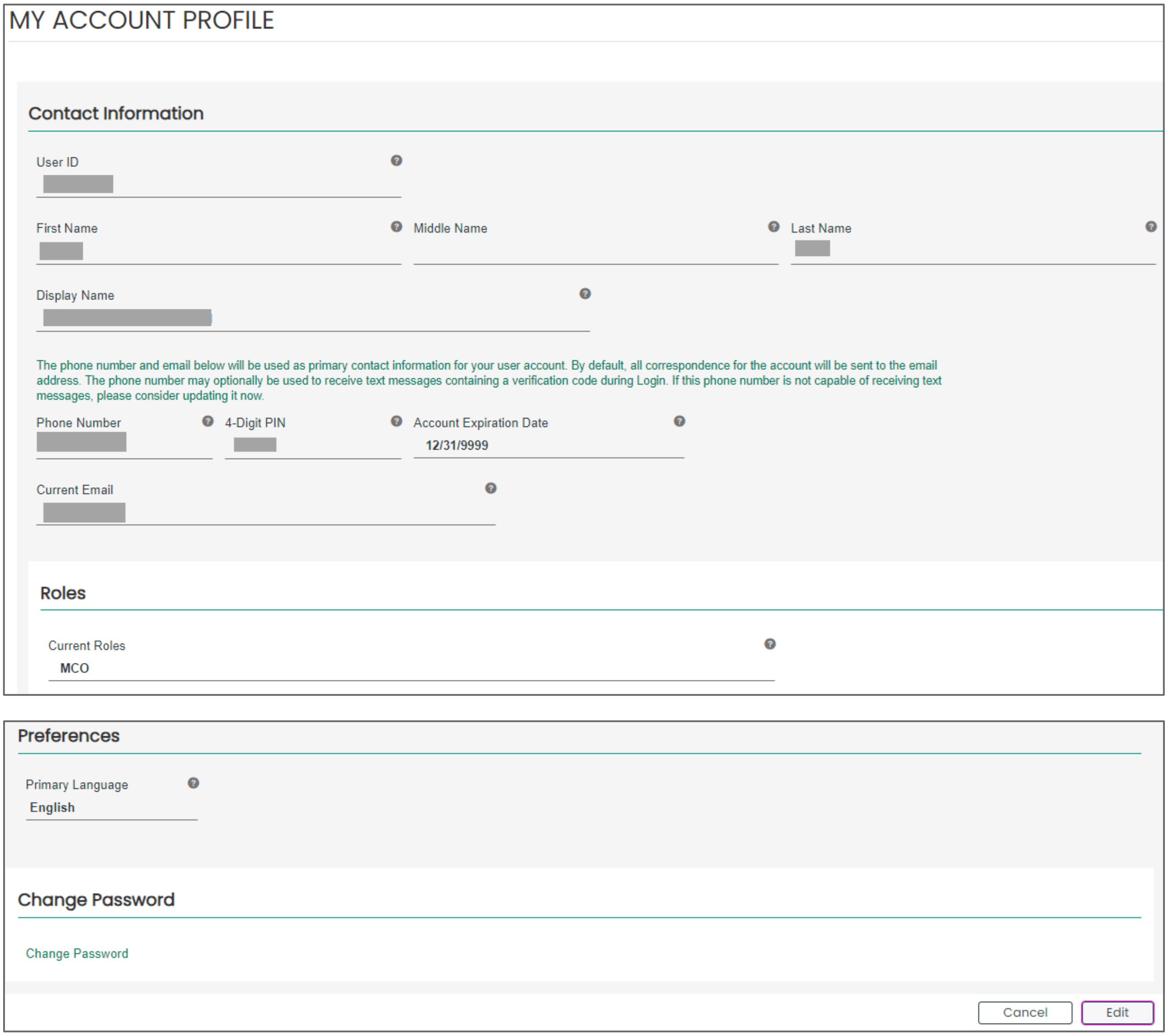
IV. My Account

A. Provider Profile Maintenance

This feature enables users to view and update their profile information in the **Portal Profile Maintenance** window.



1. Click the **Hamburger** ≡ Icon on the home page and select or hover over the **My Account** menu option.
2. Select the **Portal Profile Maintenance** option from the main menu.



3. Click **EDIT** to update profile information.
4. Enter updated information in the required/optional fields as needed.
5. Click **SAVE** to update the profile information.

NOTE: Users can reset values by clicking **RESET** or **CANCEL** to close the **EDIT** page without saving any changes.

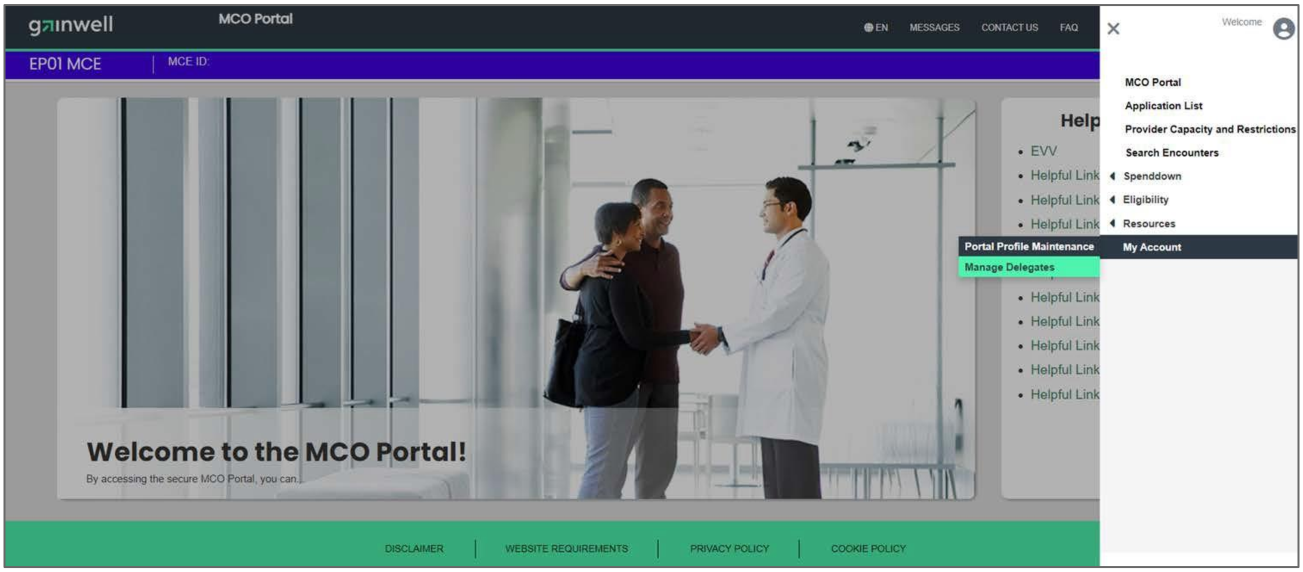
B. Managing Delegates

The **Manage Delegates** feature enables users to establish and maintain a list of delegates who can work in the MCO Portal on the primary user's behalf. Delegates can perform functions in the MCO Portal that are assigned by the user they represent. The intention of this functionality is to allow an organization's users to give MCO Portal access to their clerical or administrative staff.

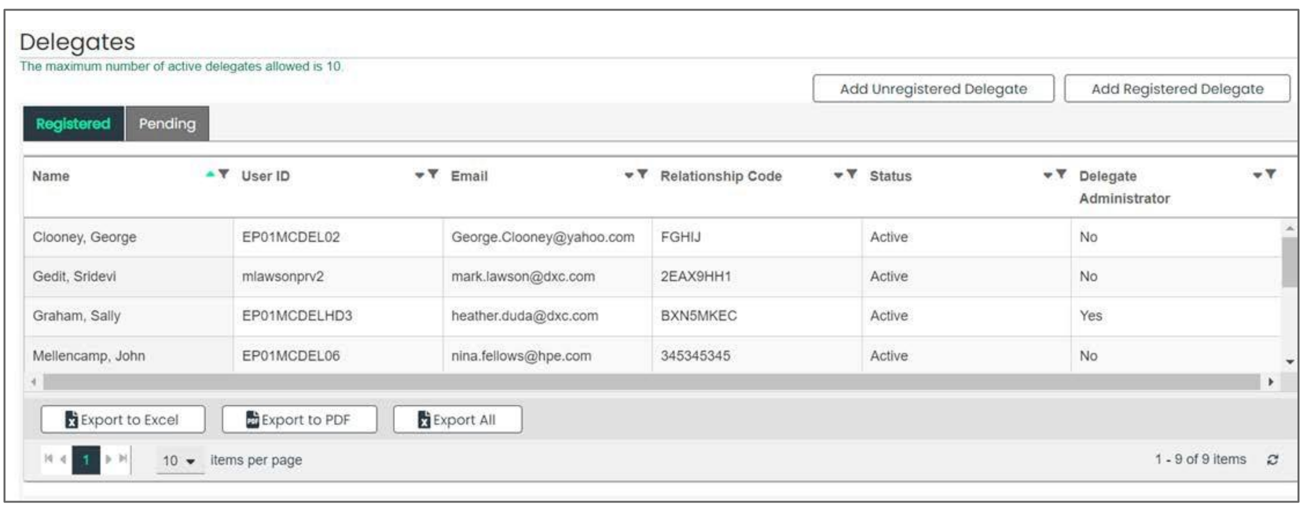
Delegates perform functions in the MCO Portal that are assigned by the user they represent.

Delegate Administrators (DA) can access all the functions available to the user they represent. This includes creating other delegates assigned to work on behalf of a user. Additional information on creating DA delegates is available in this section.

If a maximum number of delegates is assigned to a given organization, it is defined on the **Manage Delegates** page.



1. Click the **Hamburger** icon on the home page and select or hover over the **My Account** menu option.
2. Select the **Manage Delegates** option from the main menu.



Name	User ID	Email	Relationship Code	Status	Delegate Administrator
Clooney, George	EP01MCDEL02	George.Clooney@yahoo.com	FGHIJ	Active	No
Gedit, Sridevi	mlawsonprv2	mark.lawson@dxc.com	2EAX9HH1	Active	No
Graham, Sally	EP01MCDELHD3	heather.duda@dxc.com	BXN5MKEC	Active	Yes
Mellencamp, John	EP01MCDEL06	nina.fellows@hpe.com	345345345	Active	No

The **Manage Delegates** page displays the following column headers:

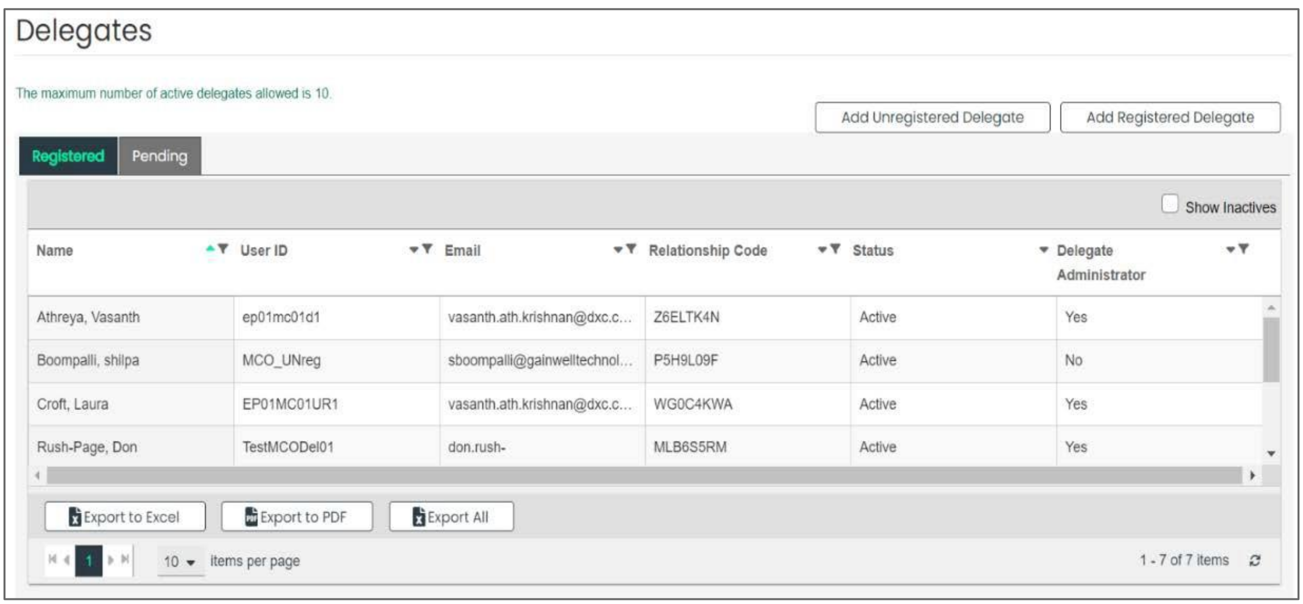
- Name
- User ID
- Email

- Relationship Code
- Status (Active/Inactive)
- Delegate Administrator (Yes/No)
- Delegate Information
    - Registered delegates display on the **Registered** tab.
    - Unregistered delegates display on the **Pending** tab.

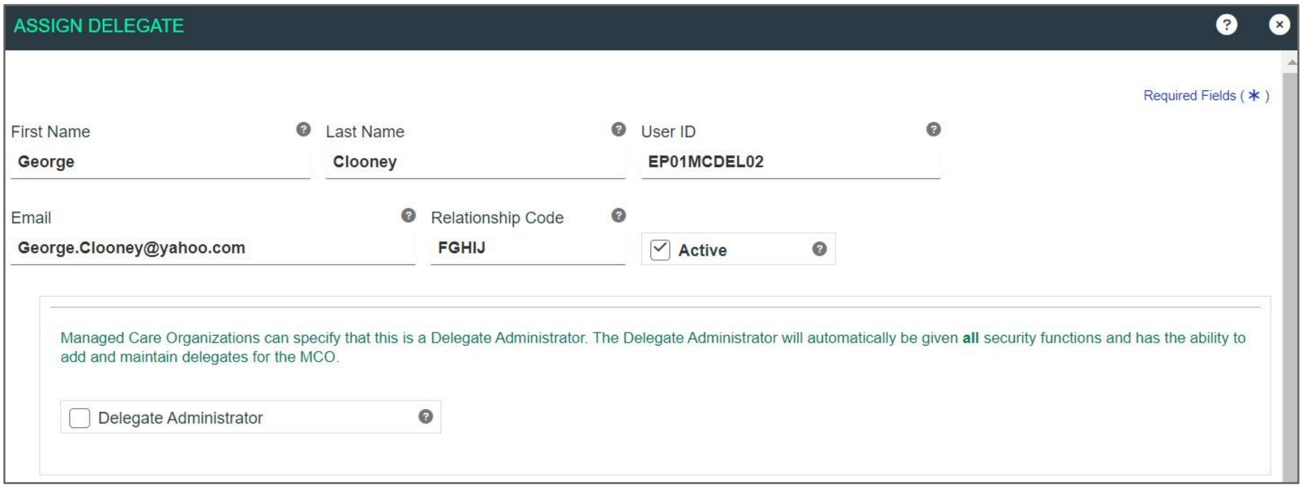
3. Click the **Export to Excel**, **Export to PDF** or **Export All** options to export the results.

1. Managing Registered Delegates

The **Manage Registered Delegates** feature enables the user to activate/inactivate a delegate or add/remove functions the delegate can perform on the primary user's behalf.



1. Double-click a delegate row on the **Registered** tab to view details on the **Assign Delegate** page.



2. Select the status of the delegate as **Active** or **Inactive**.

    - If the delegate works on the primary user's behalf, select the **Active** checkbox. This updates the account to indicate the delegate represents the organization. When active delegates log in, they can access the organization's information and represent that organization on the MCO Portal.

    - If the delegate will not work on the primary user's behalf, unselect the **Active** checkbox. This updates the account to indicate the delegate no longer represents that organization. When inactive delegates log in, they cannot access the organization's information or represent that organization on the MCO Portal.

NOTE: To learn more about security rights associated with a specific function, hover over the function name in the (a)**Available Function** or **Selected Function** box.

3. Select the delegate as a Delegate Administrator or not.

4. Assign security functions to the selected delegate by highlighting an **Available Function** and then clicking **>** to move the function to the **Selected Functions** box.

    Users can also click **>>** to move all **Available Functions** to the Selected Functions box to assign security functions to the selected delegate.

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

   Users can also click **<<** to move all **Selected Functions** to the **Available Functions** box to remove security functions of a delegate.

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

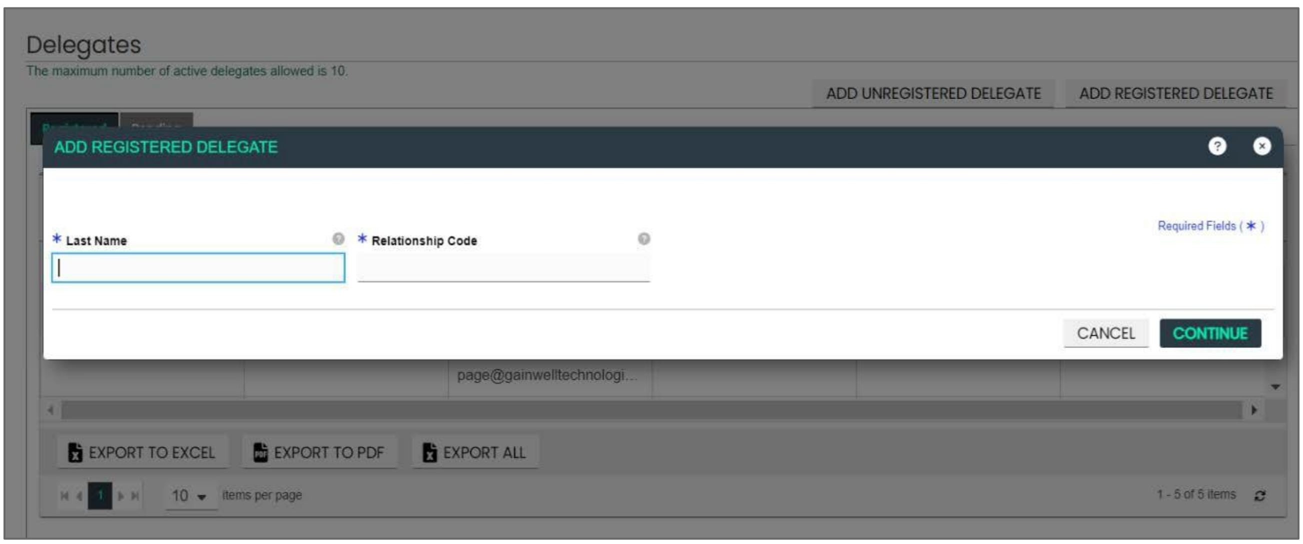
> **NOTE:** Users can reset values by clicking **Reset** or **Cancel** to close the **Assign Delegates** page without saving any changes.

2. Adding Registered Delegates

The **Add Registered Delegate** feature enables the primary user to add a delegate who is not currently associated with them. An active delegate must be assigned one or more security functions.

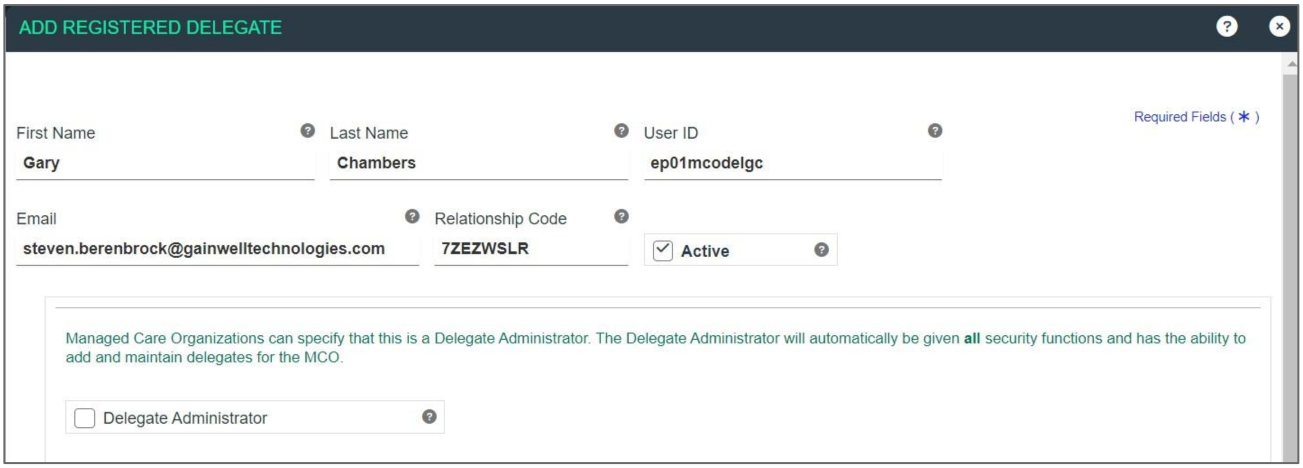
1. Click **Add Registered Delegate** to add a delegate that already has an established account with the system.

> **NOTE:** The delegate needs to provide the user with their last name and relationship code for them to receive the rights to work on the primary user's behalf.



2. Enter the delegate's **Last Name** and **Relationship Code**, and then click **CONTINUE**.

   When the last name and relationship code are validated, the **Add Registered Delegate** page displays the validated delegate's information.



3. Select the status of the delegate as **Active** or **Inactive**.

    - If the delegate works on the primary user's behalf, select the **Active** checkbox. This updates the account to indicate the delegate represents the organization. When active delegates log in, they can access the organization's information and represent that organization on the MCO Portal.

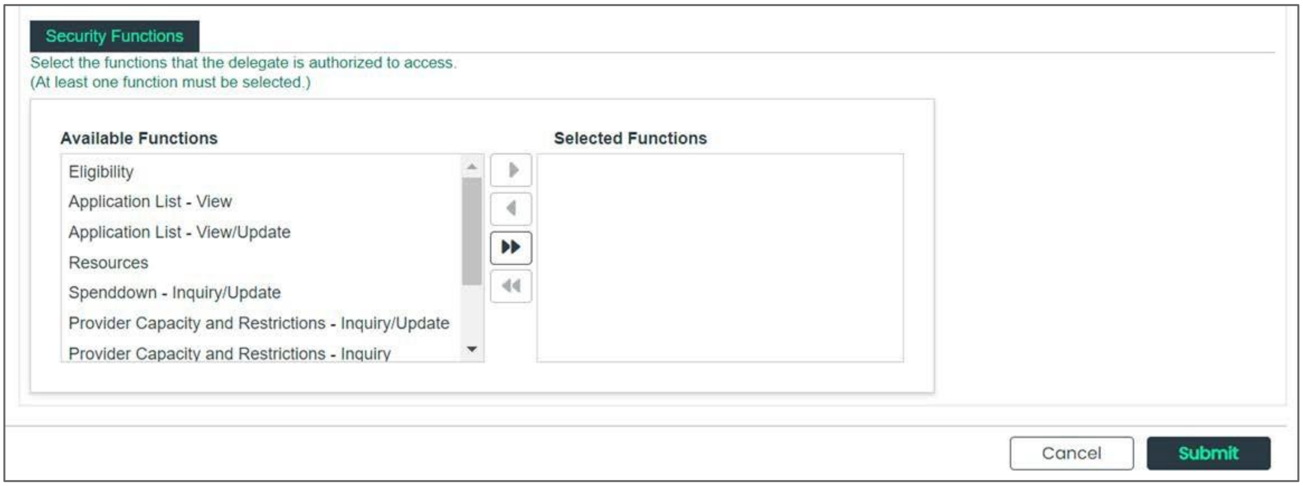
    - If the delegate will not work on the primary user's behalf, unselect the **Active** checkbox. This updates the account to indicate the delegate no longer represents the organization. When inactive delegates log in, they cannot access the organization's information or represent that organization on the MCO Portal.

4. Select the delegate as a Delegate Administrator (DA) or not.

    - If the delegate is a Delegate Administrator for the primary user, select the **Delegate Administrator** checkbox. The Delegate Administrator (DA) has access to all security functions, including the ability to add and maintain delegates.

    - If the delegate will not be a Delegate Administrator, unselect the **Delegate Administrator** checkbox. A delegate is only given the security functions that have been assigned to them.

NOTE: To learn more about security rights associated with a specific function, hover over the function name in the (a)**Available Function** or **Selected Function** box.

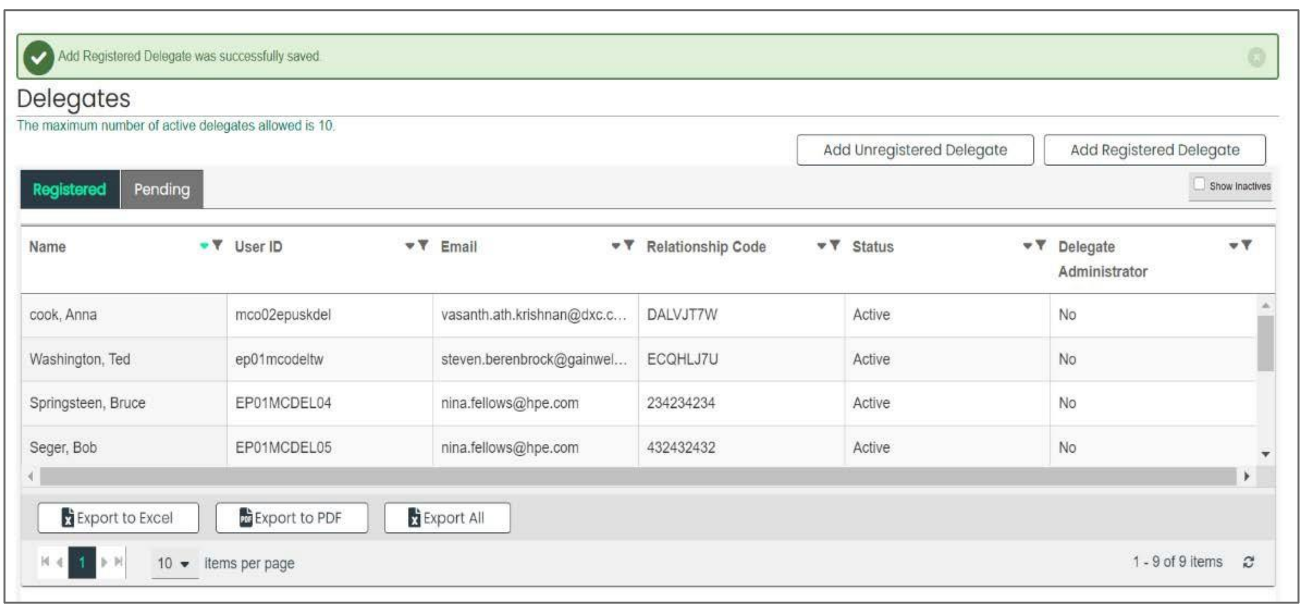


5. Assign security functions to delegates that are not a Delegate Administrator by highlighting an **Available Function** and then clicking > to move the function to the **Selected Functions** box.

   Users can also click **>>** to move all **Available Functions** to the **Selected Functions** box to assign security functions to the selected delegate.

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

   Users can also click **<<** to move all **Selected Functions** to the **Available Functions** box to remove security functions of a delegate.



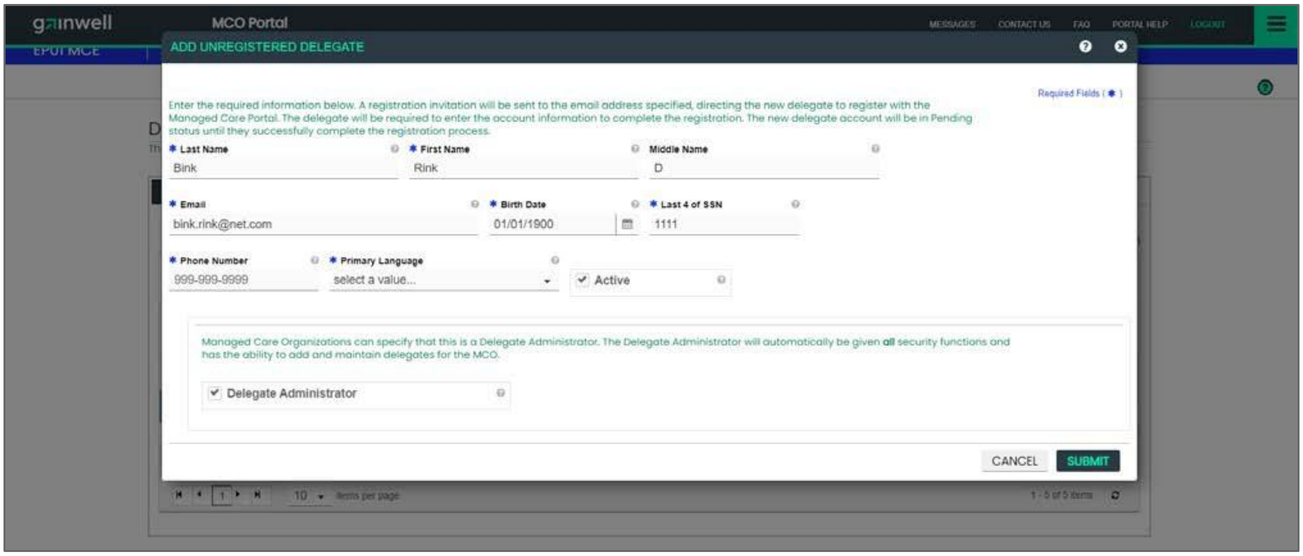
7. Click **SAVE** to save the delegate information. The user must select at least one security function for active delegates.

NOTE: Users can reset values by clicking **RESET** or **CANCEL** to close the **Add Registered Delegate** page without saving any changes.

3. Adding Unregistered Delegates

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.

1. Click **Add Unregistered Delegate** to add a brand-new delegate that does not have an established account with the system.



2. Enter the following required fields:
   a. Last Name
   b. First Name
   c. Email
   d. Birth Date
   e. Last 4 of SSN
   f. Phone Number
   g. Primary Language

NOTE: The delegate uses the Last Name, Email, Birth Date, and Last 4 of SSN information to register with the system.

3. Select the status of the delegate as **Active** or **Inactive**.
   - If the delegate works on the primary user's behalf, select the **Active** checkbox. This updates the account to indicate the delegate represents the organization. When active delegates log in, they can access the organization's information and represent that organization on the MCO Portal.

- If the delegate will not work on the primary user's behalf, unselect the **Active** checkbox. This updates the account to indicate the delegate no longer represents that organization. When inactive delegates log in, they cannot access the organization's information or represent that organization on the MCO Portal.

4. Select the delegate as a Delegate Administrator (DA) or not.

   - If the delegate is a Delegate Administrator for the primary user, select the **Delegate Administrator checkbox**. The Delegate Administrator (DA) has access to all security functions, including the ability to add and maintain delegates.

   - If the delegate will not be a delegate administrator, unselect the **Delegate Administrator** checkbox. A delegate is given only the security functions that have been assigned to them.

NOTE: To learn more about security rights associated with a specific function, hover over the function name in the (a)**Available Function** or **Selected Function** box.

5. Assign security functions to the selected delegate by highlighting an **Available Function** and then clicking > to move the function to the Selected Functions box.

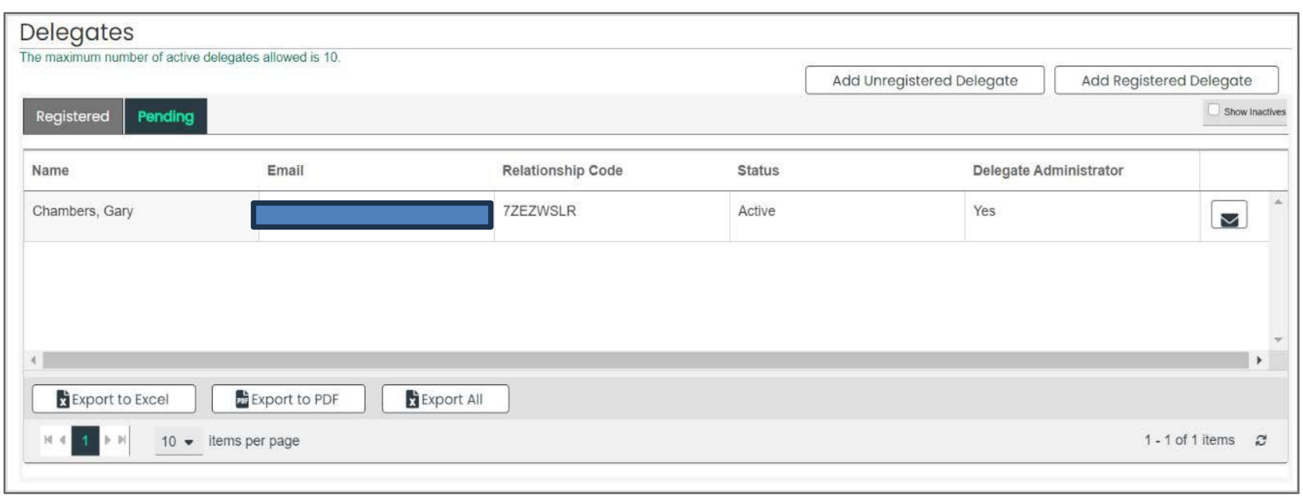
   Users can also click **>>** to move all **Available Functions** to the **Selected Functions** box to assign security functions to the selected delegate.

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

   Users can also click **<<** to move all **Selected Functions** to the **Available Functions** box to remove security functions of a delegate.

7. Click **Submit** to save the delegate information and initiate an invitation to register that is sent to the email address entered in the email field. The unregistered delegate is listed on the **Pending** tab until they successfully register with the system. Upon successful registration, it is moved to the **Registered** tab.

NOTE: Users can reset values by clicking **RESET** or **CANCEL** to close the **Assign Delegates** page without saving any changes.



8. Click the envelop icon to resend an invitation.

From:
Sent: Tuesday, July 26, 2022 4:07 PM
To:
Subject: Account Security Notification
Importance: High

gainwell

Medicaid Management Solutions

Registration Invitation

You are being invited to register with our healthcare application. To complete your registration, use the invitation code below and follow the register now link.

Note that this invitation will expire if not acted upon within a timely manner. We encourage you to register as soon as possible to avoid complications.

Invitation Code: **3RNHBC7X**

Register Now

Gainwell Technologies Account Service Team

Phone:

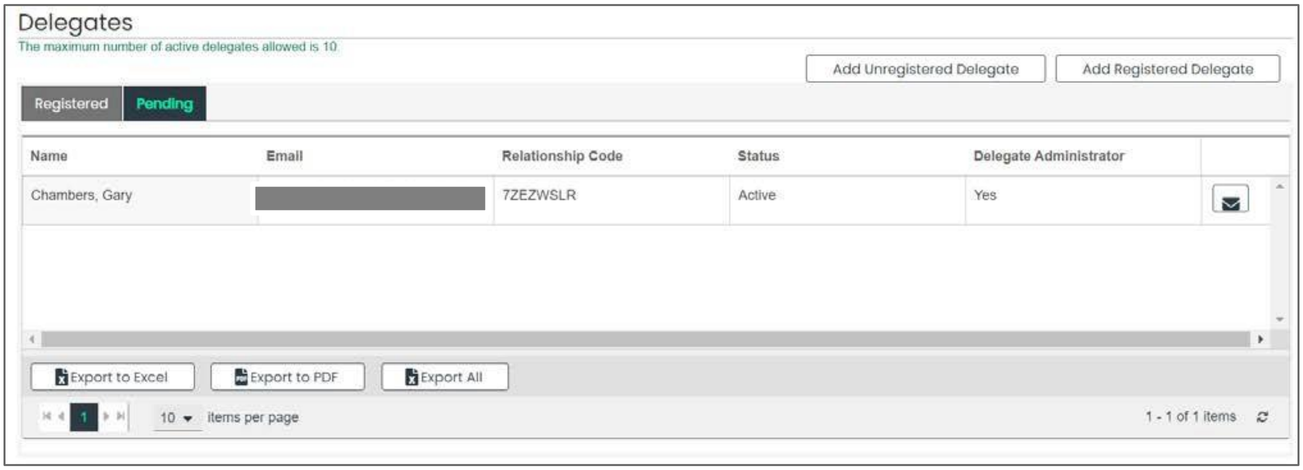
Email: app

IM-C-0001 07/26/2022 16:07:13

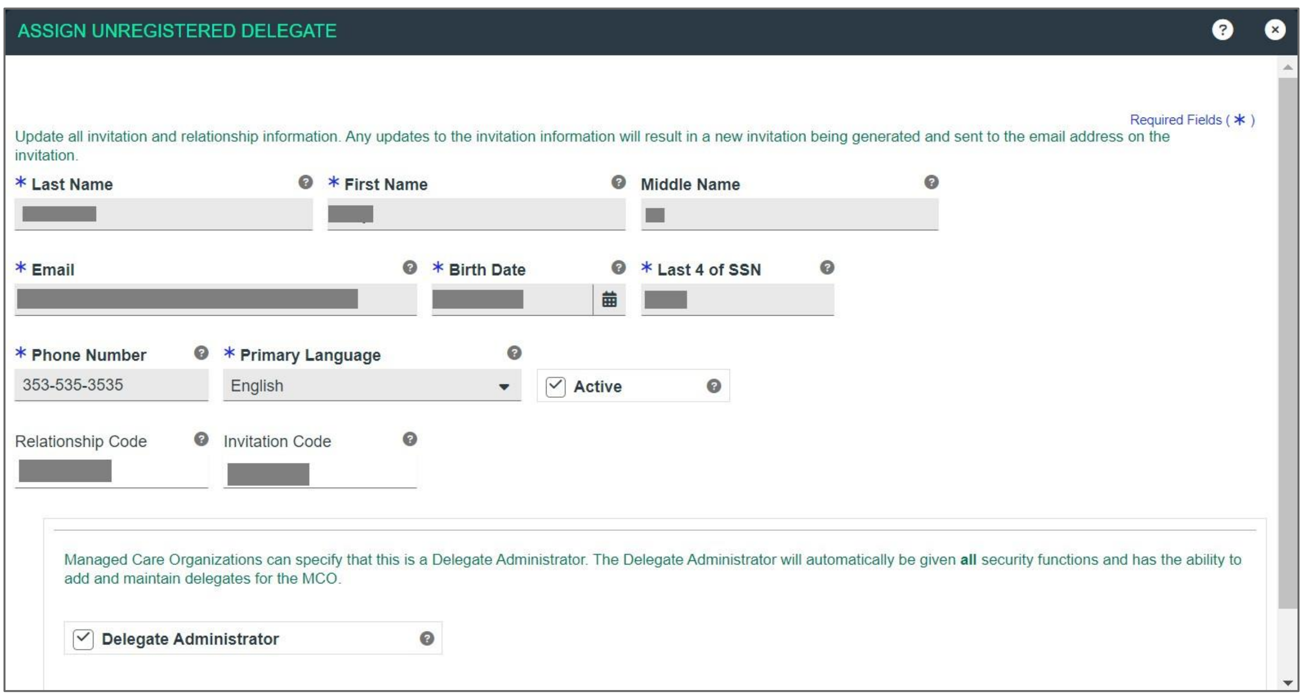
NOTE: To complete the registration process, follow the instructions detailed in the *Identity Management Registration User Guide*.

C. Managing Unregistered Delegates

The **Manage Unregistered Delegates** feature enables the user to change personal information for a delegate, activate/inactivate a delegate, or add/remove functions the delegate can perform on the primary user's behalf.



1. Double-click a delegate row on the **Pending** tab to view details on the **Assign Unregistered Delegate** page.



2. Update the following required fields:
    a. Last Name
    b. First Name
    c. Email
    d. Birth Date

e. Last 4 of SSN

f. Phone Number

g. Primary Language

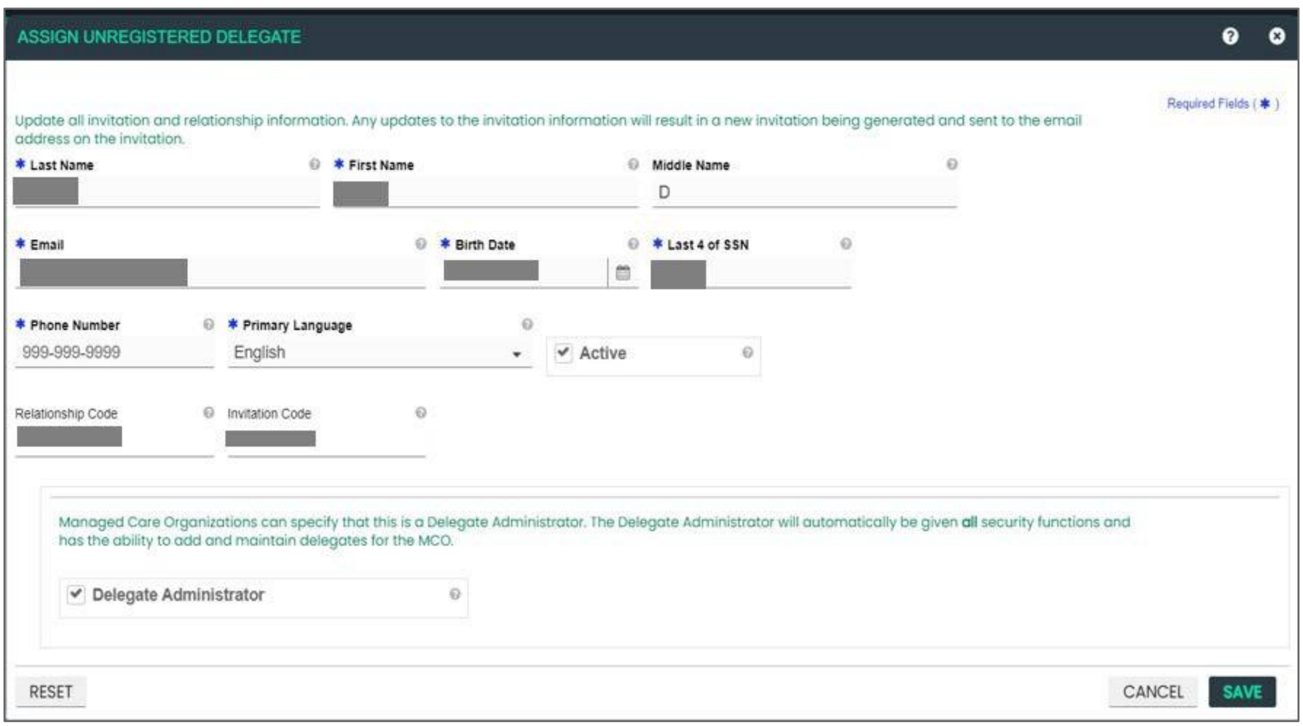
NOTE: If the Last Name, First Name, Middle Name, Email, Birth Date, Last 4 of SSN, Phone Number, or Primary Language fields are modified, a new invitation code is generated and a new invitation to register is sent to the email address entered the email field.

The delegate uses the Last Name, Email, Birth Date, and Last 4 of SSN information to register with the system.

3. Select the status of the delegate as **Active** or **Inactive**.

   - If the delegate works on the primary user's behalf, select the **Active** checkbox. This updates the account to indicate the delegate represents the organization. When active delegates log in, they can access the organization's information and represent that organization on the MCO Portal.

   - If the delegate will not work on the primary user's behalf, unselect the **Active** checkbox. This updates the account to indicate the delegate no longer represents that organization. When inactive delegates log in, they cannot access the organization's information or represent that organization on the MCO Portal.



4. Select the delegate as a **Delegate Administrator** (DA) or not.

   - If the delegate is a Delegate Administrator for the primary user, select the **Delegate Administrator** checkbox. The Delegate Administrator (DA) has access to all security functions, including the ability to add and maintain delegates.

- If the delegate will not be a Delegate Administrator, unselect the **Delegate Administrator** checkbox. A delegate is given only the security functions that have been assigned to them.

NOTE: To learn more about security rights associated with a specific function, hover over the function name in the (a)**Available Function** or **Selected Function** box.

5. Assign security functions to the selected delegate by highlighting an **Available Function** and then clicking > to move the function to the **Selected Functions** box.

   Users can also click **>>** to move all **Available Functions** to the **Selected Functions** box to assign security functions to the selected delegate.

6. Remove security functions of a delegate by highlighting a Selected Function and then clicking < to move the function to the Available Functions box.

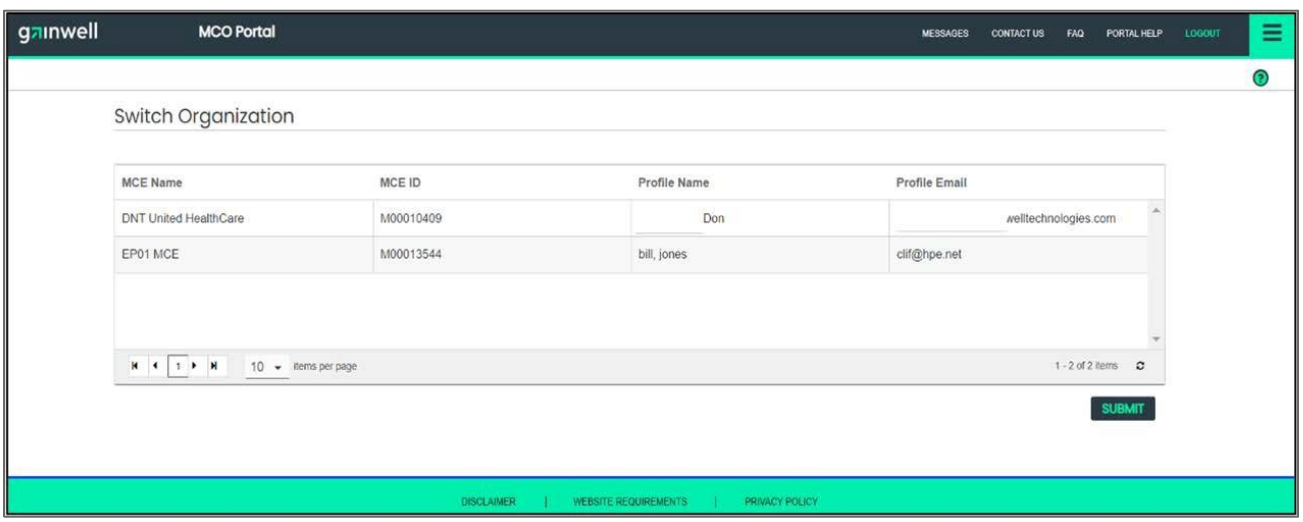
   Users can also click **<<** to move all **Selected Functions** to the **Available Functions** box to remove security functions of a delegate.

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

NOTE: Users can reset values by clicking **RESET** or **CANCEL** to close the **Assign Delegates** page without saving any changes.

D. Managing Delegates as a Delegate Administrator

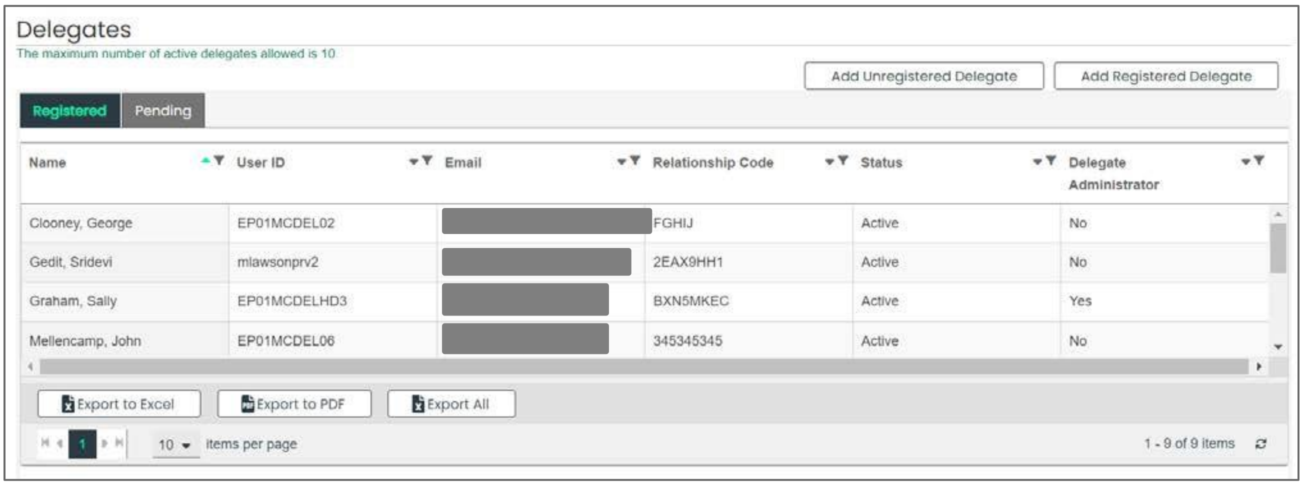
The **Manage Delegates** feature is made available to all delegates the primary users define as a Delegate Administrator (DA). A Delegate Administrator can create or update a delegate to work on the behalf of the primary user on whose behalf the DA is working. However, a DA cannot create or update the rights for other Delegate Administrators.



1. Select the organization on the behalf the user wants to work from the **Switch Organization** page as a Delegate Administrator.

2. Click **SUBMET**.

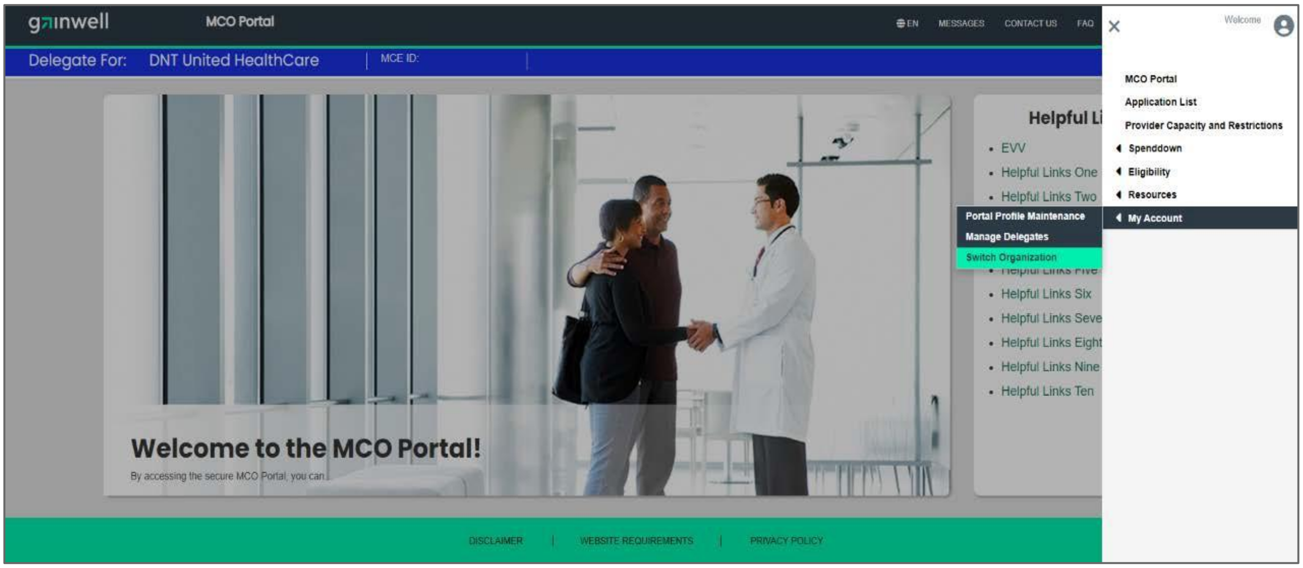
3. Select **My Account**, and then click **Managed Delegates** from the main menu. The **Delegates** page displays.
4. Click **Add Registered Delegate** to add a delegate that already has an established account with the system. See the Adding Registered Delegates section for more information on adding a registered delegate.
5. Double-click a delegate row on the **Registered** tab to view details on the **Assign Delegate** page. See the **Manage Registered Delegates** section for more information on updating a registered delegate.
6. Click **Add Unregistered Delegate** to add a new delegate that does not have an established account with the system. See the **Adding Unregistered Delegates** section for more information on adding an unregistered delegate.
7. Double-click a delegate row on the **Pending** tab to view details on the **Assign Unregistered Delegate** page. See the **Manage Unregistered Delegates** section for more information on updating an unregistered delegate.



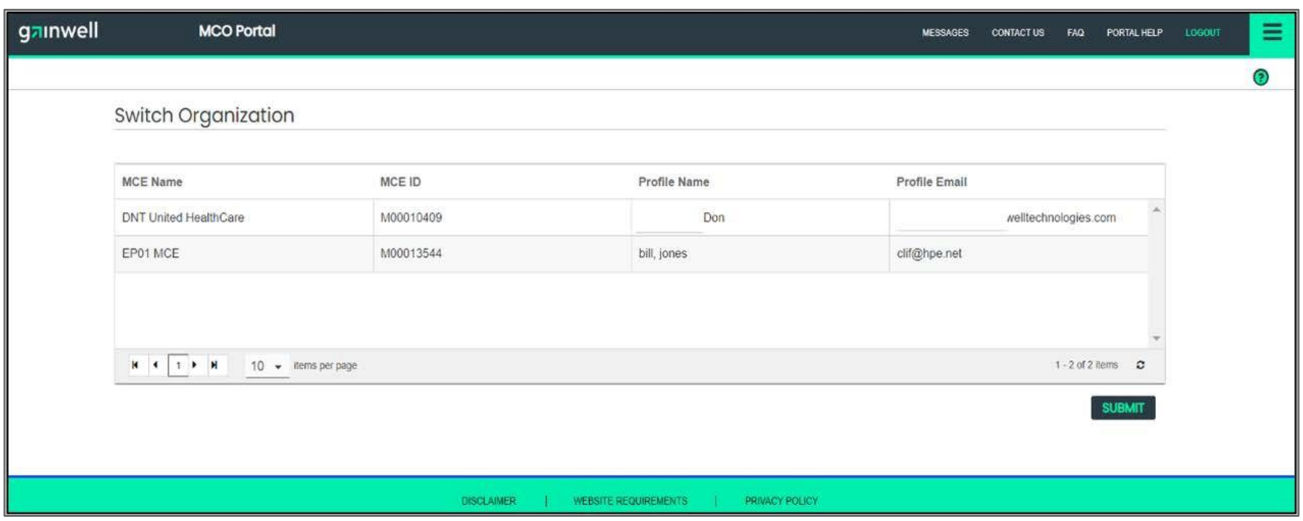
NOTE: As a Delegate Administrator, users are unable to create, assign, or update another Delegate Administrator. Only the primary user can create, assign, or update Delegate Administrators.

1. Switching Organizations

The **Switch Organization** feature enables delegates to select the organization(s) on whose behalf they want to work. When a delegate is assigned to multiple organizations, the **Switch Organization** page displays. After the delegate selects an organization, permission is granted for those MCO Portal functions to which access has been granted. For delegates with multiple organizations, the **Switch Organization** feature enables them to switch between organizations without logging out of the portal.

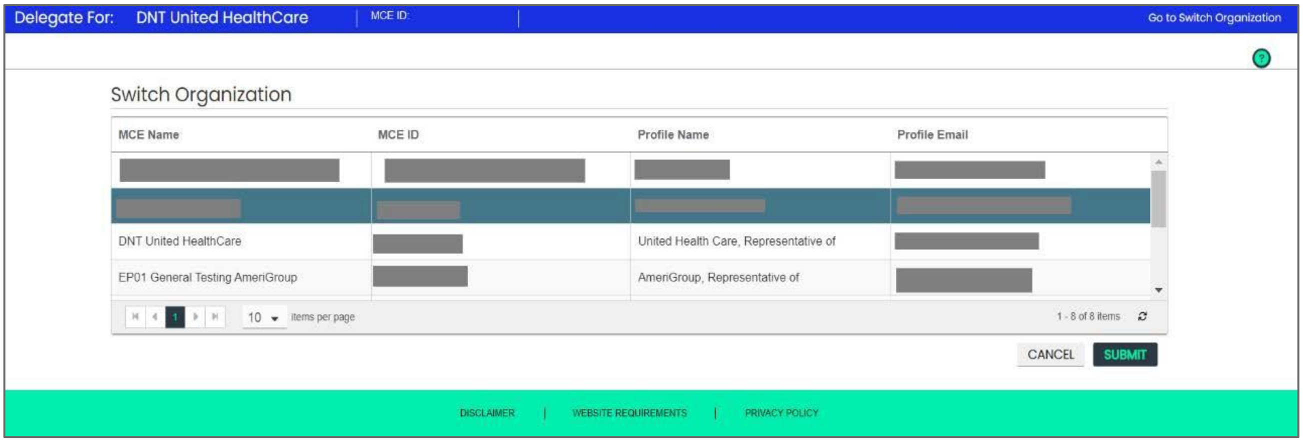


1. Click the **Hamburger** Icon on the home page and select or hover over the **My Account** menu option.
2. Select the **Switch Organization** option from the main menu.



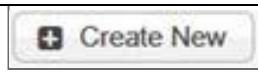
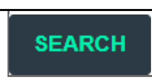
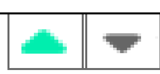
3. S elect the organization on whose behalf the user is assigned to work.
4. Click **SUBMIT** to return to the **MCO Portal Home** page.

NOTE: After a delegate has selected an organization to work on their behalf, that organization's information displays in the Delegate Information Panel at the top of the page.



Delegate For: DNT United HealthCare
MCE ID:
Go to Switch Organization
Switch Organization
MCE Name
MCE ID
Profile Name
Profile Email
DNT United HealthCare
United Health Care, Representative of
EP01 General Testing AmeriGroup
AmeriGroup, Representative of
10
items per page
1 - 8 of 8 items
CANCEL
SUBMIT
DISCLAIMER
WEBSITE REQUIREMENTS
PRIVACY POLICY

I. Appendix A: Functional Buttons

(a)	Name	Icon Details
Back		Returns to the previous page.
Cancel		Cancel the search and close the window or ignore changes and return information to their original values.
Create New		Adds a new record.
Edit		Allows changes to the record.
Filtering		Opens filter options for search results.
Help		Opens the system help page.
Paging		Allows navigation using arrows or page numbers. Changes the number of items displayed in the search results grid.
Preview		Shows an HTML block, as it would display onscreen.
Print		When the user clicks Print, a pop-up display asks the user to save/open the file depending on the browser the user is using. The user must save/open the file first and then proceed to print the document from there.
Reset		Resets any changes back to the last save point.
Save		Saves any data entered in the add/edit windows.
Search		Starts a search based on the submitted search criteria.
Sorting		Sorts search results column in ascending or descending order.
Tooltip		Displays help text when mouse cursor is hovered over icon. Found throughout the module.

V. Appendix B: Error Messages by Field

1. Action

Error Message	Appears When User	Resolves When User
Action is a required field.	Leaves field blank.	Enters valid values.

2. Choose Type

Error Message	Appears When User	Resolves When User
Type is a required field.	Fails to select a provider name type and clicks Search.	Select a provider name type and click **Search**.

3. Contract End Date

Error Message	Appears When User	Resolves When User
Contract End Date is a required field.	Fails to enter a value.	Enters **Contract End Date**, then clicks **Save**.
Date must represent a valid date in the format MM/DD/YYYY.	Enter the invalid date.	Enter only valid characters, then click Save.
The date must be between 01/01/1900 and 12/31/9999.	Enters date out of the accepted range.	Enter date within range, then click **Save**.
Date cannot be future date.	Enter future date.	Enter current or past date and click **Save**.

4. Contract Start Date

Error Message	Appears When User	Resolves When User
Contract Start Date is a required field.	Fails to enter a value.	Enters **Contract Start Date**, then clicks **Save**.
Date must represent a valid date in the format MM/DD/YYYY.	Enter the invalid date.	Enter only valid characters, then click **Save**.
The date must be between 01/01/1900 and 12/31/9999.	Enters date out of the accepted range.	Enter current or past date and click **Save**.
Date cannot be future date.	Enter future date.	Enters start date that is before the end date.
Contract Start Date cannot be greater than Contract End Date.	Enters a start date that is after the end date or an end date that is earlier than the start date.	Enters start date that is before the end date.
Provider participation dates are outside of the network provider dates.	Enters participation dates that are not within the network dates.	Enter participation dates that are within the network dates.

5. Effective Date

Error Message	Appears When User	Resolves When User
Effective Date is a required field.	Fails to enter a value.	Enters **Contract End Date**, then clicks **Save**.
Effective Date must represent a valid date in the format MM/DD/YYYY.	Enter the invalid date.	Enter only valid characters, then click **Save**.
Effective Date must be between 01/01/1900 and 12/31/9999.	Enters date out of the accepted range.	Enter date within range, then click **Save**.
Date cannot be future date.	Enter future date.	Enter current or past date and click **Save**.

6. End Date

Error Message	Appears When User	Resolves When User
End Date is a required field.	Fails to enter a value.	Enter **End Date**, then clicks **Save**.
Effective Date must represent a valid date in the format MM/DD/YYYY.	Enter the invalid date.	Enter only valid characters, then click **Save**.
Effective Date must be between 01/01/1900 and 12/31/9999.	Enters date out of the accepted range.	Enter date within range, then click **Save**.
Date cannot be future date.	Enter future date.	Enter current or past date and click **Save**.

7. Invalid Search Criteria

Error Message	Appears When User	Resolves When User
Invalid Search Criteria	More than one * wildcard is used.	Enters valid characters and clicks **Search**.

8. Last Name

Error Message	Appears When User	Resolves When User
Last Name is a required field.	Fails to enter a last name and clicks on the **Search** button.	Enter the last name and click **Search**.

9. Network ID

Error Message	Appears When User	Resolves When User
Network ID is a required field.	Fails to Enter value in Network ID field and clicks **Search**.	Enters a value in Network ID and clicks **Search** /clicks **Reset**.
Network ID is restricted to alphanumeric characters only [A-Z], [a-z], [0-9].	Enters special characters in Network ID field and clicks **Search**.	Enters a valid value in Network ID and clicks **Search** /clicks **Reset**.

10. NPI

Error Message	Appears When User	Resolves When User
NPI is a required field.	Fails to enter value in NPI field and clicks on **Search**.	Enters a value in NPI and clicks on **Search** /clicks **Reset**.
NPI is restricted to numeric characters only [0-9].	Enters special characters in NPI field and clicks **Search**.	Enters a valid value in NPI and clicks on **Search** /clicks **Reset**.
Type is a required field.	Fails to select a type of Provider name and clicks **Search**.	Select a type of Provider name and click on **Search** /clicks **Reset**.

11. Provider Business Name

Error Message	Appears When User	Resolves When User
Business Name is a required field.	Fails to enter a value in Business Name field and clicks **Search**.	Enters a value in Business Name field and clicks on **Search** /clicks **Reset**.
Business Name contains invalid characters. The following characters are not allowed; * ^ : ~ < > % and space.	Enters unrestricted special characters in Business Name field and clicks **Search**.	Enters a valid value in Business Name field and clicks on **Search** /clicks **Reset**.

12. Provider Individual Name – First Name

Error Message	Appears When User	Resolves When User
First Name contains invalid characters. The following characters are not allowed; * ^ : ~ < > % and space.	Enters unrestricted special characters in First Name field and clicks **Search**.	Enters a valid value in First Name field and clicks on **Search** /clicks **Reset**.

13. Provider Individual Name – Last Name

Error Message	Appears When User	Resolves When User
Last Name is a required field.	Fails to enter a value in Last Name field and clicks **Search**.	Enters a value in Last Name field and clicks **Search** /clicks **Reset**.
Last Name contains invalid characters. The following characters are not allowed; * ^ : ~ < > % and space.	Enters unrestricted special characters in Last Name field and clicks **Search**.	Enters a valid value in Last Name field and clicks **Search** /click **Reset**.

14. Provider Individual Name – Middle Name

Error Message	Appears When User	Resolves When User
Middle Name contains invalid characters. The following characters are not allowed ; * ^ : ~ < > % and space.	Enters unrestricted special characters in Middle Name field and clicks **Search**.	Enters a valid value in Middle Name field and clicks **Search** /click **Reset**.

15. Search By

Error Message	Appears When User	Resolves When User
Search By is a required field.	Leaves field blank.	Enters valid values.

16. Service Location ID

Error Message	Appears When User	Resolves When User
Service Location ID is a required field.	Fails to enter a value in the Service Location ID field and clicks **Search**.	Enters a value in Service Location ID and clicks **Search** button/clicks **Reset** button.
Service Location ID is restricted to alphanumeric characters only [A-Z], [a-z], [0-9].	Enters special characters in Service Location ID field and clicks **Search**.	Enters a valid value in the Service Location ID field and clicks **Search** /clicks **Reset** button.

B. Data Grids

By default, a data grid allows tabbing to certain items (e.g., check boxes, buttons, Items Per Page drop-down, Refresh icon, etc.). You can use shortcuts in the following table to perform tasks related to elements that are not accessible by tabbing.
Grid Header

Shortcut Key	Description
Enter	Sorts by the column.
Alt+Down	Opens filter menu.
Esc	Closes filter menu.
Tab	Navigates through filter menu elements (default browser behavior).
Shift+Tab	Navigates through filter menu elements in reverse order.
Ctrl+Left Arrow	Reorders column with previous one.
Ctrl+Right Arrow	Reorders column with next one.

C. Grid Details

Shortcut Key	Description
Arrow keys	Navigates over the cells.
Enter	Toggle expands/collapses group row.
Page Up	Pages on the previous page.
Page Down	Pages on next page.
Space	Selects row of the currently highlighted cell.
Ctrl+Space	Selects or deselects current row while retaining previously selections (only for selection mode "multiple")
Shift+Space	Selects a range of rows, which is—rows between a first selected row and last when select with key combination.
Shift+Arrow Keys	Adds row while retaining previous selection (only for selection mode "multiple")
Ctrl+Home	Focuses first focusable element inside the body.
Ctrl+End	Focuses last focusable cell in the last row.
Home	Focuses first focusable cell in the row.

End	Focuses last focusable cell in the row.
Ctrl+Space	Groups/ungroups focused column.
Ctrl+Shift+S	Acts as single-click on a row containing focused cell.

Shortcut Key	Description
Ctrl+Shift+D	Acts as double-click on a row containing focused cell.

D. Date Picker

Shortcut Key	Description
Closed Popup	
Enter	Triggers change event.
Esc	Closes the popup.
Alt+Down Arrow	Opens the popup.
Alt+Up Arrow	Closes the popup.
Opened Popup (Date View)	
Left Arrow	Highlights the previous day.
Right Arrow	Highlights the next day.
Up Arrow	Highlights same day from the previous week.
Down Arrow	Highlights on the same day from the next week.
Ctrl+Left Arrow	Navigates to previous month.
Ctrl+Right Arrow	Navigates to next month.
Ctrl+Up Arrow	Navigates to previous view.
Ctrl+Down Arrow	Navigates to the next view.
Home	Highlights on the first day of the month.
End	Highlights on the last day of the month.
Enter	Selects highlighted day when in "month" view. Navigates to a lower view in others.

E. Multi Select

Shortcut Key	Description
Closed Popup	
Left Arrow	Highlights previously selected item.
Right Arrow	Highlights next selected item.
Home	Highlights first selected item.
End	Highlights last selected item.
Delete	Deletes highlighted item.
Backspace	Deletes previous selected item.
Down Arrow	Opens the popup.
Esc	Clear all items.
Opened Popup	
Up Arrow	Highlights previous item.
Shift+Up Arrow	Selects previous item.
Down Arrow	Highlights next item.
Shift+Down Arrow	Select the next item.
Home	Highlights first item in the popup.
Ctrl+Shift+Home	Select items at the beginning.
End	Highlights last item in the popup.
Page Up	Scrolls the popup up.
Page Down	Scroll the popup down.
Ctrl+Shift+End	Selects items to the end.
Enter	Selects highlighted item.
Ctrl+Space	Selects highlighted item.
Ctrl+A	Select all items.
Up Arrow	Close the popup if the first item is highlighted.
Esc	Closes the popup.