Quick Reference Guide: Provider Healthcare Portal: Managing Delegate Assignments

Introduction

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

Topics Covered:

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

What is a Delegate?

A delegate is an individual designated by an Indiana Health Coverage Programs (IHCP) provider or an MCE to use the Portal functions on behalf of the provider or MCE.

Adding a New Delegate to the Portal

After a provider or MCE has registered in the Portal, the provider or MCE can add delegates to their delegate list and authorize those delegates to use designated Portal functions.

To add a new delegate account to the Portal:

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

Figure 1: Manage Accounts Link

3. Enter the delegate's required information (**_Figure 2_**) under the Add New Delegate tab:

    a. First Name

    b. Last Name

    c. Birth Date

    d. Last 4 (digits) of Driver's License Number

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

Figure 2: Delegate Assignment Page (for Providers)

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

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

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

Figure 3: Delegate Functions (for Providers)

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

6. Review the delegate information and authorized functions (*Figure 4*).

   - If you need to change any of this information or selected function, click **Edit**.

   - If you do not wish to add the delegate user, click **Cancel**.

   - If the information is correct, click **Confirm**.

Figure 4: Delegate Information and Functions Confirmation

7. Communicate the delegate code (*Figure 5*) displayed at the bottom of the Delegate Assignment page to the new delegate. Let the delegate know where to find the Online Registration training on indianamedicaid.com, and instruct the delegate to use the provided delegate code to register a delegate account in the Portal to begin using Portal functions for the provider or MCE.

NOTE: It is the provider or MCE's responsibility to communicate the delegate code to the delegate. Communication will not be sent via the Portal to inform the delegate of his or her code.

Figure 5: Delegate Code

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Adding a Registered Delegate

A registered delegate is a delegate that already has an established account in the Portal. A registered delegate can be authorized by more than one provider or MCE to use authorized Portal functions on their behalf.

To add a registered delegate and authorize functions:

1. Log into the Portal.

2. Click **Manage Accounts** (*Figure 1*).

3. Click the **Add Registered Delegate** tab (*Figure 6*).

4. Enter the delegate's last name and delegate code (*Figure 6*).

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

Figure 6: Add Registered Delegate Tab

5. Select the functions that the delegate will be authorized to access (*Figure 6*).

6. Click **Submit** (*Figure 6*) to advance to the next page for confirmation.

7. Review the delegate information and authorized functions and click **Confirm** (*Figure 4*).

8. Communicate with the registered delegate that he or she has been added to the delegate list.

Changing a Delegate's Status

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

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

To change a delegate's status to inactive:

1. Log into the Portal.

2. Click **Manage Accounts** (*Figure 1*).

3. Scroll to the bottom of the page and click the name link for the delegate (*Figure 7*).

Figure 7: Delegate Name Link and Status

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

Figure 8: Inactive Status Selection

5. Click **Submit** (*Figure 8*) to advance to the next page for confirmation.

6. Review the delegate information and authorized functions and click **Confirm** (*Figure 4*).

Editing a Delegate's Authorized Functions

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

To edit a delegate's authorized functions:

1. Log into the Portal.

2. Click **Manage Accounts** (*Figure 1*).

3. Scroll to the bottom of the page and click the name link for the delegate (*Figure 7*).

4. Select or deselect the applicable functions (*Figure 9*).

Figure 9: Edit Authorized Delegate Functions

5. Click **Submit** (*Figure 9*) to advance to the next page for confirmation.

6. Review the delegate information and authorized functions and click **Confirm** (*Figure 4*).

7. Communicate with the delegate that authorized functions have been edited.