Job Aid

Managing Delegates

This document describes how a Coordinated Care Organization (CCO) provider manages delegates on the MESA Provider Portal.

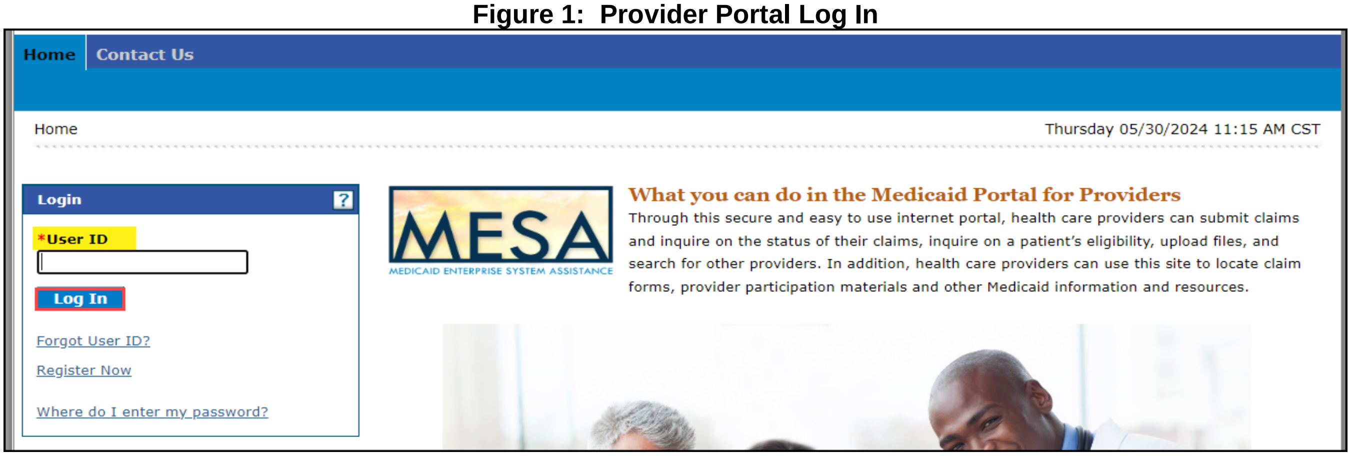
Managing Accounts

Managing accounts allows providers to add delegates that are new or already registered delegates, grant specific functional access, remove delegates, and edit delegate access. Additionally, a trading partner can be added or removed.

Complete the following steps to add a New Delegate:

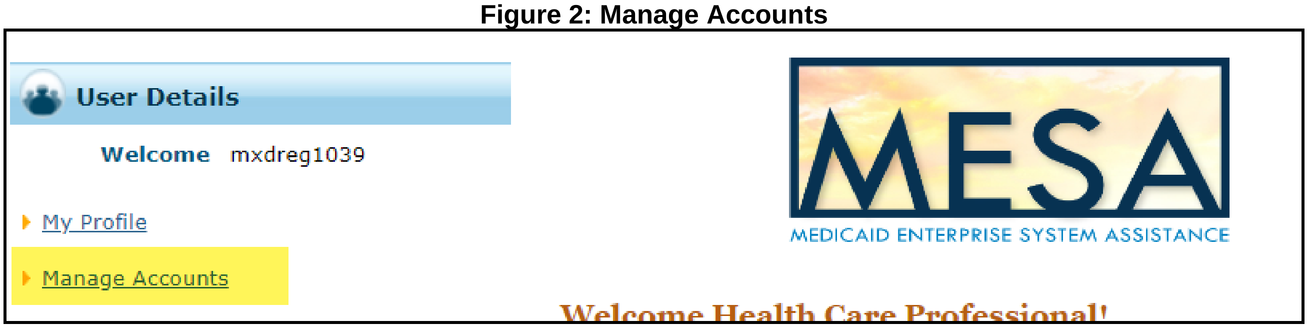
1. Access the MESA Provider Portal from the DOM website.
2. At the Home page, enter the User ID and select Log In.

Figure 1: Provider Portal Log In



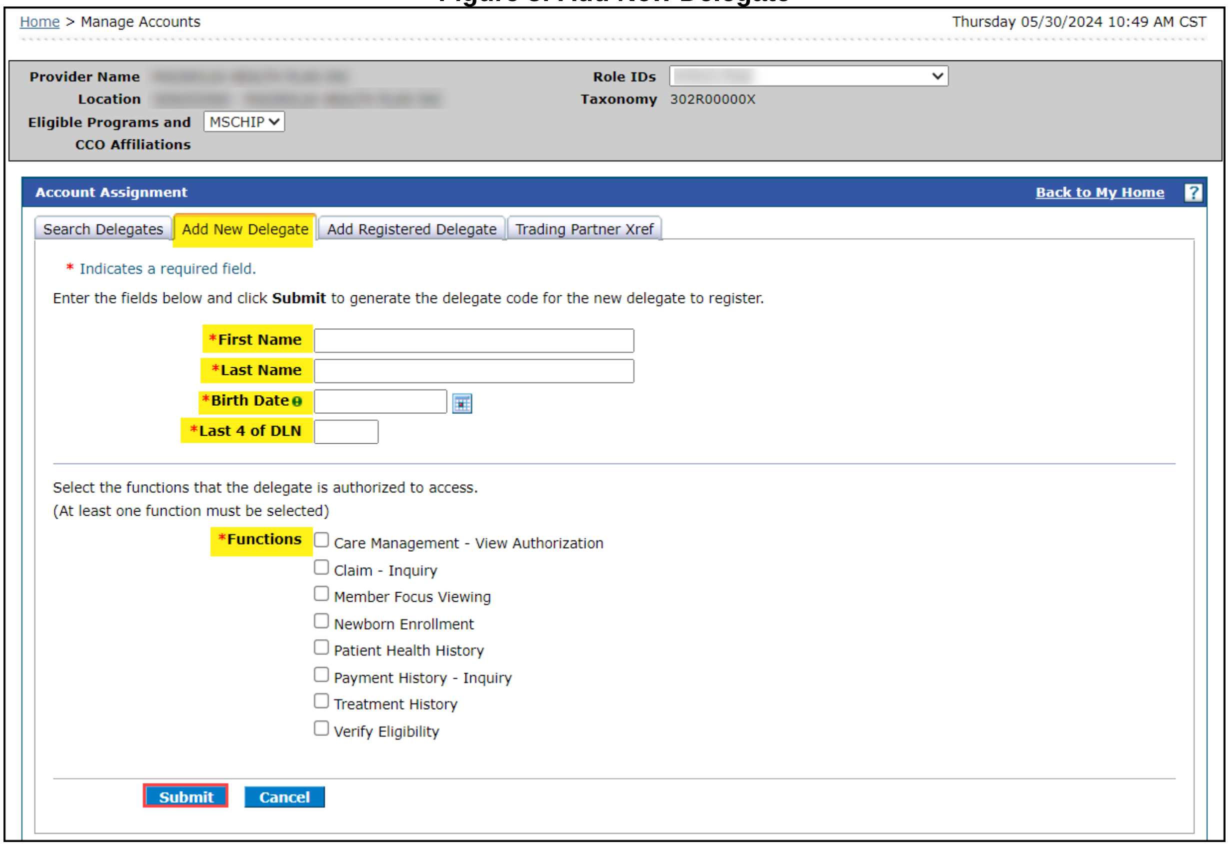
3. The system opens the Home page. Select the **Manage Accounts** link located under User Details.

Figure 2: Manage Accounts



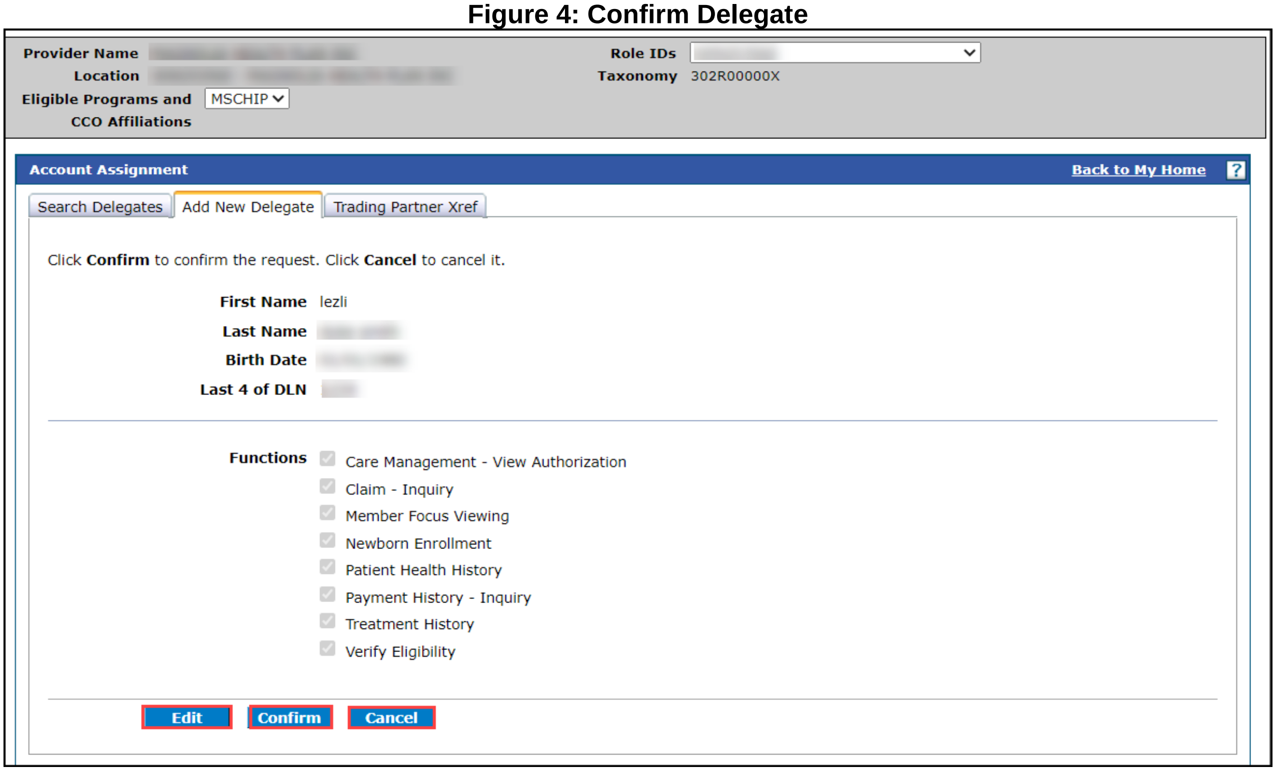
4. Select the **Add New Delegate** Tab.
5. Enter the delegates First Name, Last Name, Birth Date, and Last 4 of the DLN (drivers license number).
6. Select the **Functions** that the delegate is authorized to access. At least one function must be selected.
7. Select **Submit**.

Figure 3: Add New Delegate



8. From here you can Edit, Confirm, or Cancel. If no changes need to be made, select **Confirm.**

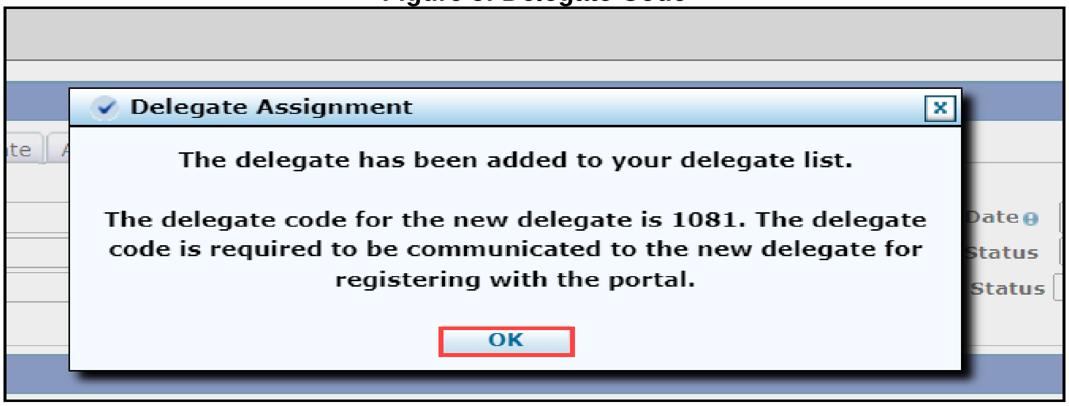
Figure 4: Confirm Delegate



A message will pop up confirming the delegate has been added to your delegate list along with the delegate code. The delegate code is needed for the Delegate to register for the MESA Provider Portal. Make sure the code is provided to your delegate.

9. Select **OK**.

Figure 5: Delegate Code

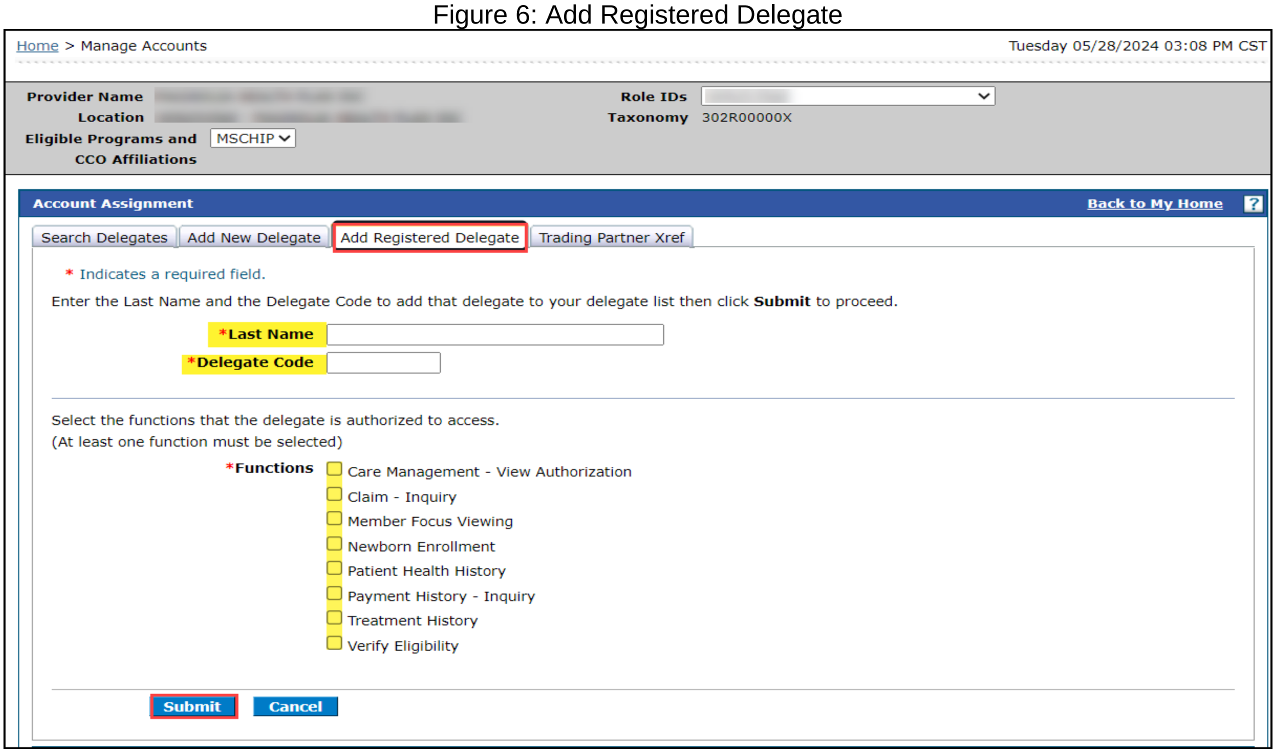


If a delegate has already registered for the MESA Provider Portal, but they are not assigned to your delegate list, these are the steps to add them. You will need the <u>delegate code</u> to complete this process.

Addng a Registered Delegate:

10. Select the **Add Registered Delegate** tab.
11. Enter the **Last Name**, **Delegate Code**, and select the **Functions** the delegate is allowed to access.
12. Select **Submit.**

Figure 6: Add Registered Delegate

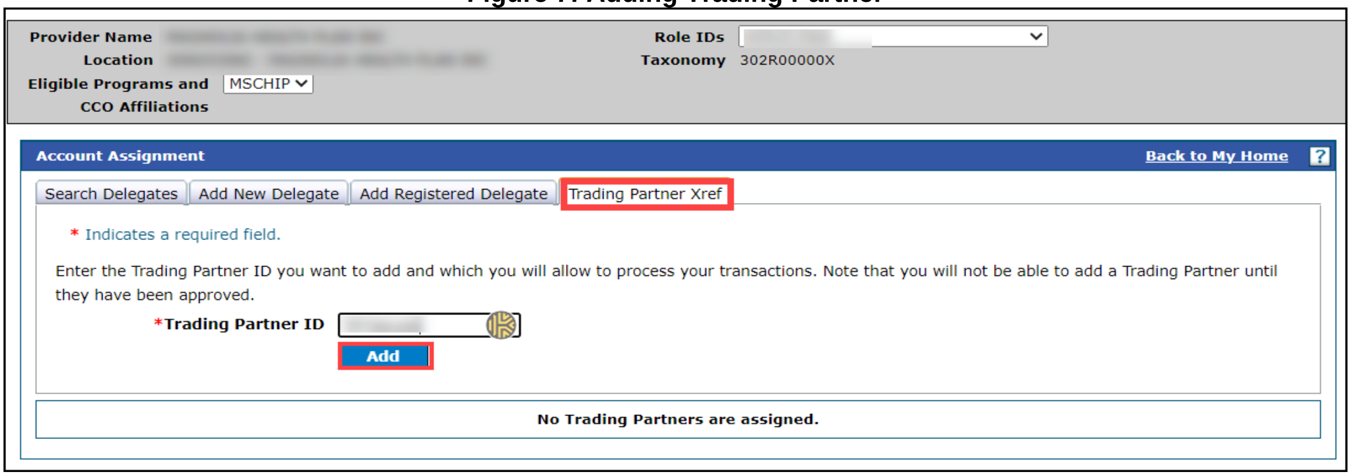


Trading Partners can be added and granted access to process the providers’ transactions. A Trading Partner cannot be added until they have been approved.

Follow these steps to add a Trading Partner:

13. Select the **Trading Partner XRef** tab.
14. Enter the **Trading Partner ID**.
15. Select **Add**.
16. If you already have a Trading Partner listed, that Trading Partner will need to be removed before adding a new one, see Figure 9.

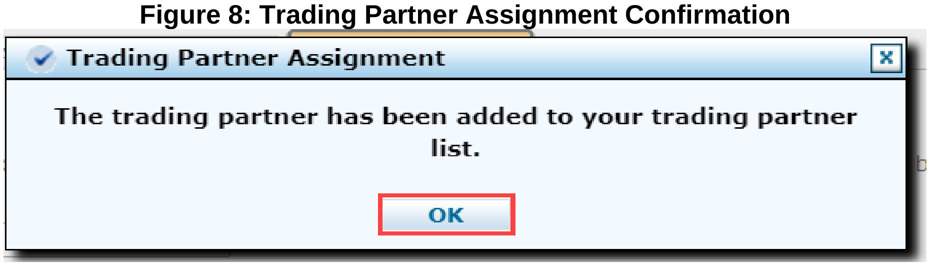
Figure 7: Adding Trading Partner



Once you select Add, a confirmation message will populate.

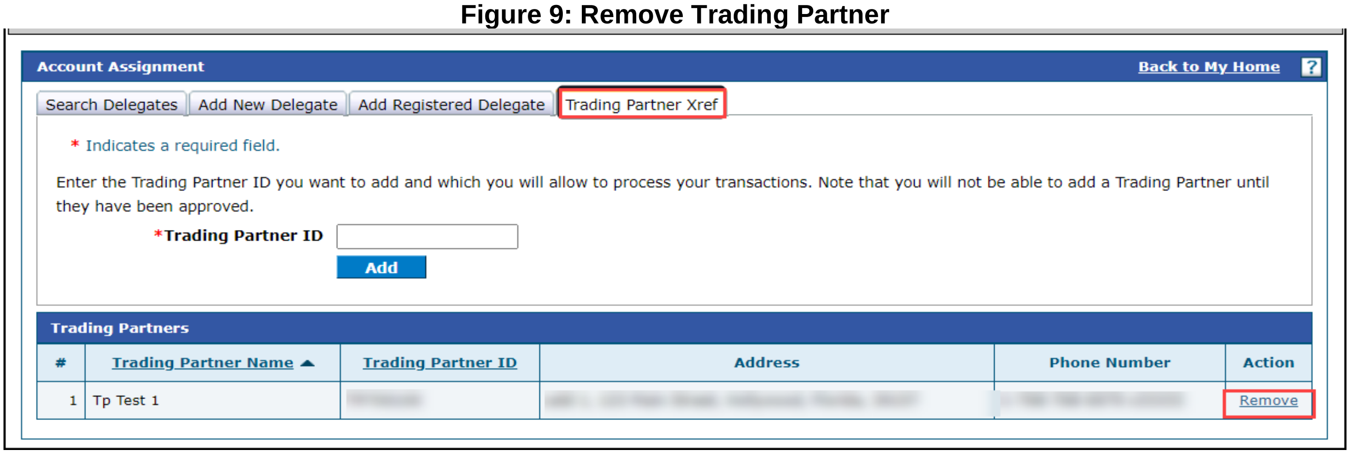
17. Select **OK.**

Figure 8: Trading Partner Assignment Confirmation



18. Select the Remove hyperlink to remove the current Trading Parfner before adding a new one.

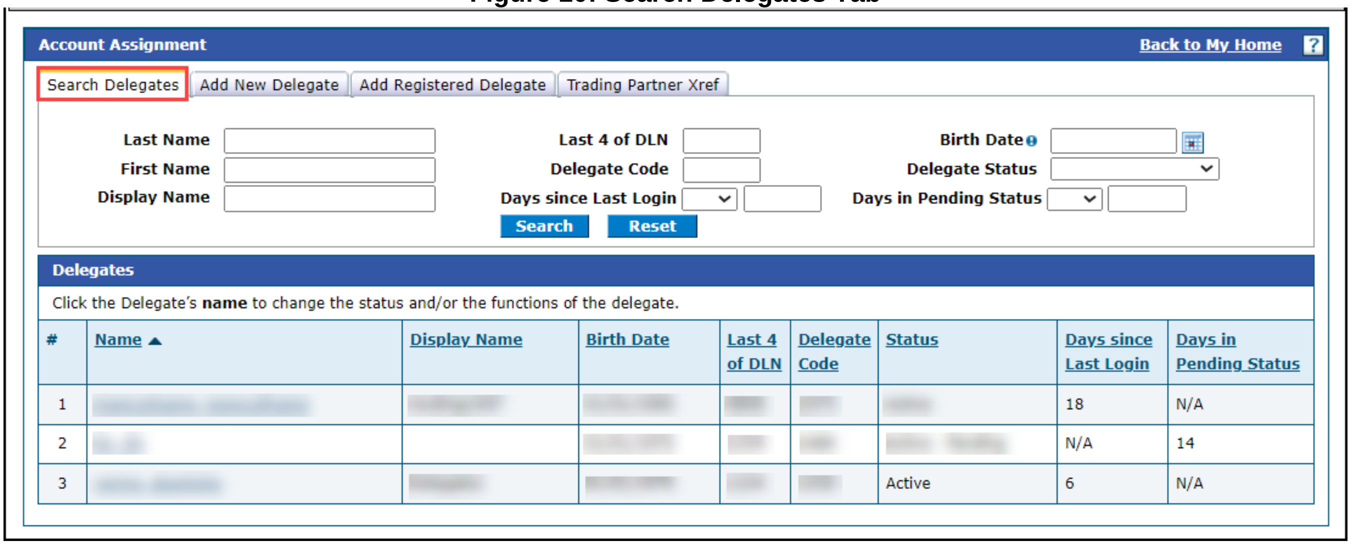
Figure 9: Remove Trading Partner



Follow these steps to edit or remove a delegate:

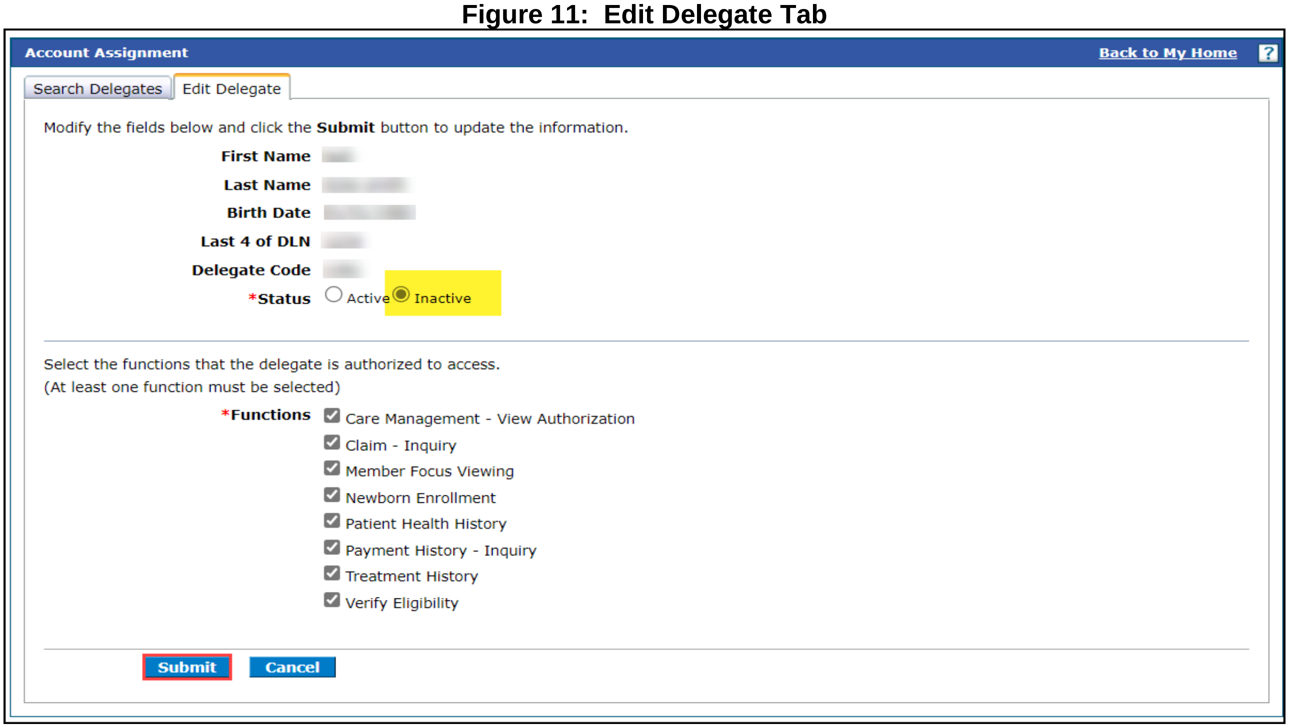
19. Select the **Search Delegates** tab.Search using last name and first name. However, if there are a lot of delegates listed, data can be entered into each field to obtain a more specific search result. The more information entered, the more specific the search will be. Select **Search**.

Figure 10: Search Delegates Tab



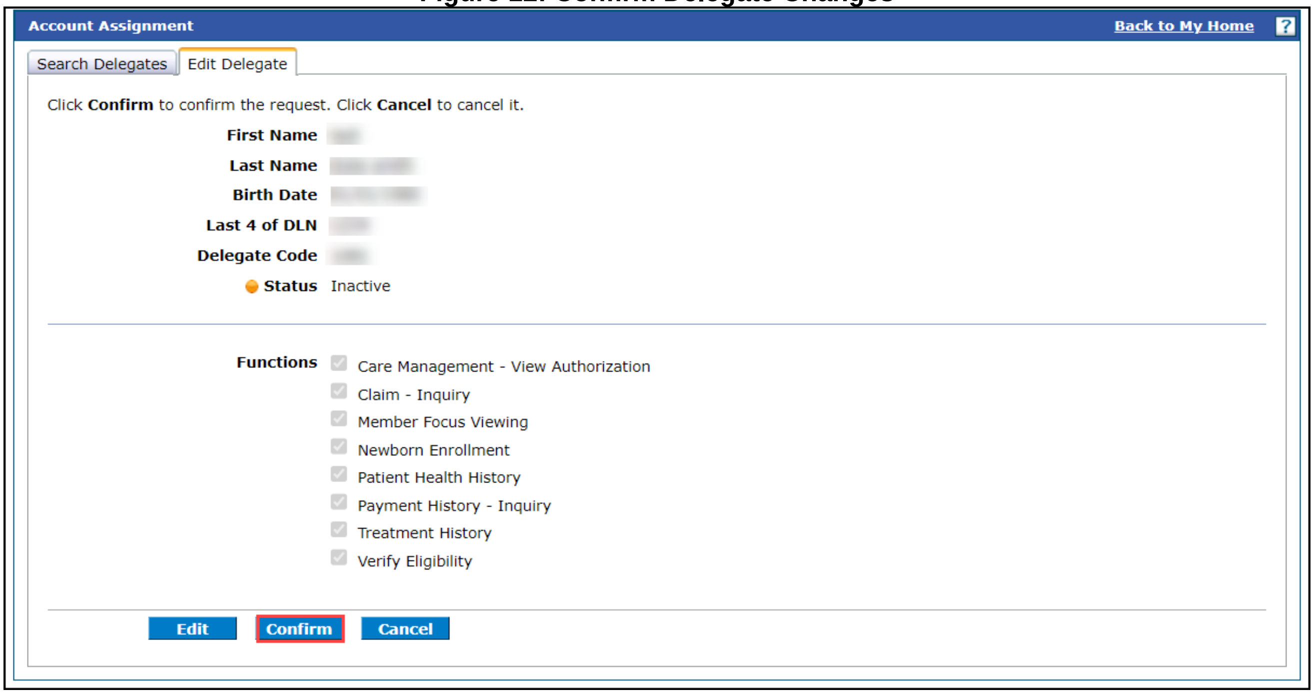
20. Select the name of the delegate you want to change their access or make them inactive. You cannot delete a delegate, but you can make them inactive, which will remove their access.
21. Select the **Inactive** option to remove their access. Uncheck the **Functions** box to remove specific access.
22. Select **Submit**.

Figure 11: Edit Delegate Tab



23. Edit, Confirm or Cancel the request. Select **Confirm** to confirm the changes made. If changes still need to be made, select Edit. Select Cancel to cancel this request.
24. The status can be edited and the access can be updated at any time.

Figure 12: Confirm Delegate Changes



Note: *If a delegate has not registered their account, the status will show Active-Pending until they register. If status is Active, they have registered.*

Change History

The following change history log contains a record of changes made to this document:

Version #	Published/ Revised	Author	Section/Nature of Change
1.0	07/17/2024	Gainwell	Initial publication