

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

Home > Manage Accounts Thursday 05/30/2024 10:49 AM CST

Provider Name [Redacted] **Role IDs** [Dropdown] **Location** [Redacted] **Taxonomy** 302R00000X
Eligible Programs and CCO Affiliations MSCHIP

Account Assignment Back to My Home ?

[Search Delegates](#) **Add New Delegate** [Add Registered Delegate](#) [Trading Partner Xref](#)

* Indicates a required field.
Enter the fields below and click **Submit** to generate the delegate code for the new delegate to register.

***First Name** [Text Field]
***Last Name** [Text Field]
***Birth Date** [Date Picker]
***Last 4 of DLN** [Text Field]

Select the functions that the delegate is authorized to access.
(At least one function must be selected)

***Functions**
 Care Management - View Authorization
 Claim - Inquiry
 Member Focus Viewing
 Newborn Enrollment
 Patient Health History
 Payment History - Inquiry
 Treatment History
 Verify Eligibility

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

Figure 4: Confirm Delegate

Provider Name [Redacted] **Role IDs** [Dropdown] **Location** [Redacted] **Taxonomy** 302R00000X
Eligible Programs and CCO Affiliations MSCHIP

Account Assignment Back to My Home ?

[Search Delegates](#) **Add New Delegate** [Trading Partner Xref](#)

Click **Confirm** to confirm the request. Click **Cancel** to cancel it.

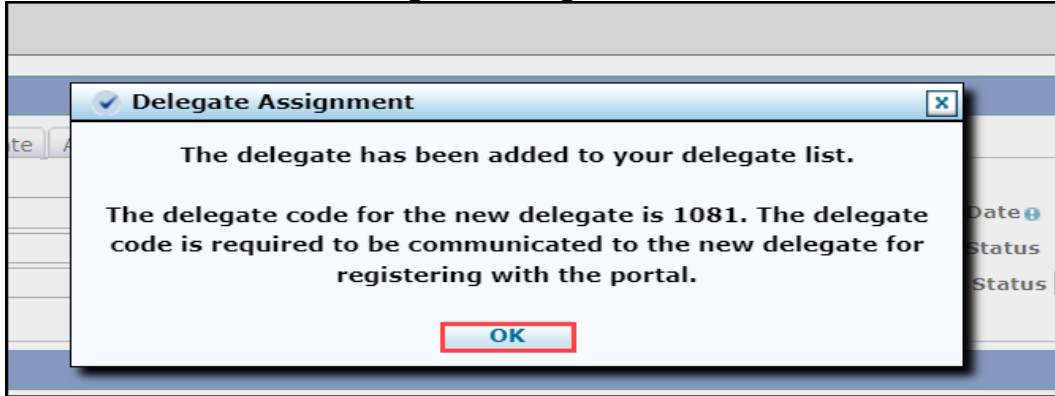
First Name lezli
Last Name [Redacted]
Birth Date [Redacted]
Last 4 of DLN [Redacted]

Functions
 Care Management - View Authorization
 Claim - Inquiry
 Member Focus Viewing
 Newborn Enrollment
 Patient Health History
 Payment History - Inquiry
 Treatment History
 Verify Eligibility

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 delegate code to complete this process.

Adding 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

Home > Manage Accounts Tuesday 05/28/2024 03:08 PM CST

Provider Name **Role IDs**
Location **Taxonomy** 302R00000X
Eligible Programs and CCO Affiliations

Account Assignment Back to My Home ?

* Indicates a required field.

Enter the Last Name and the Delegate Code to add that delegate to your delegate list then click **Submit** to proceed.

*Last Name

*Delegate Code

Select the functions that the delegate is authorized to access.
(At least one function must be selected)

*Functions

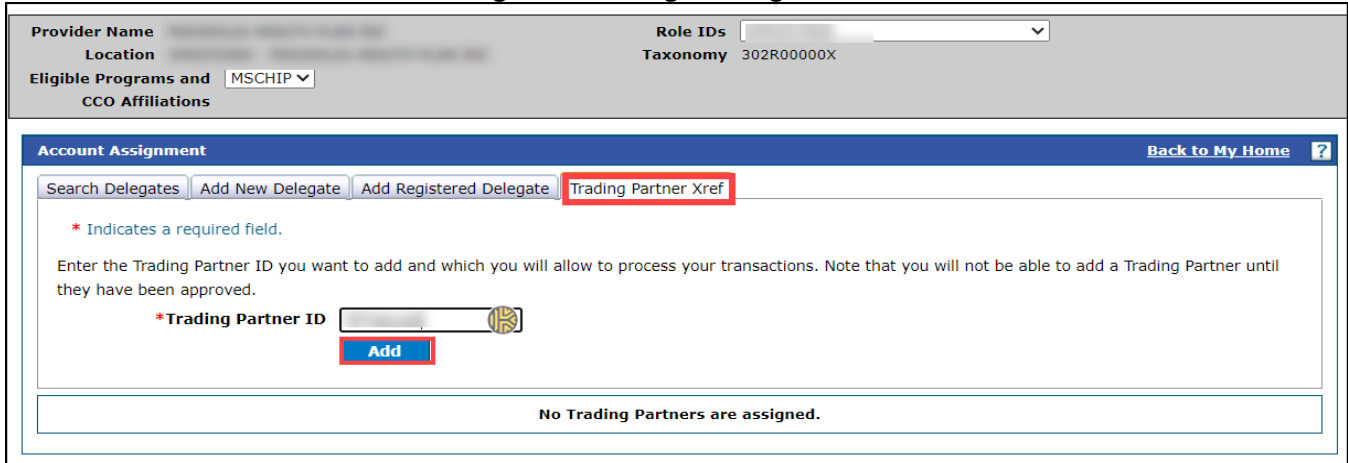
- Care Management - View Authorization
- Claim - Inquiry
- Member Focus Viewing
- Newborn Enrollment
- Patient Health History
- Payment History - Inquiry
- Treatment History
- Verify Eligibility

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



Provider Name: [Redacted] Role IDs: [Dropdown]
 Location: [Redacted] Taxonomy: 302R00000X
 Eligible Programs and CCO Affiliations: MSCHIP [Dropdown]

Account Assignment Back to My Home ?

Search Delegates | Add New Delegate | Add Registered Delegate | **Trading Partner Xref**

* Indicates a required field.

Enter the Trading Partner ID you want to add and which you will allow to process your transactions. Note that you will not be able to add a Trading Partner until they have been approved.

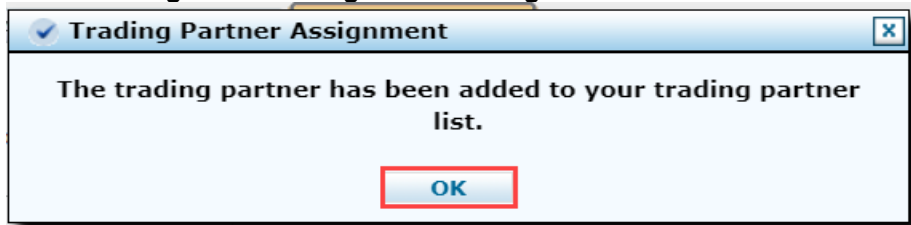
*Trading Partner ID: **Add**

No Trading Partners are assigned.

Once you select Add, a confirmation message will populate.

17. Select **OK**.

Figure 8: Trading Partner Assignment Confirmation



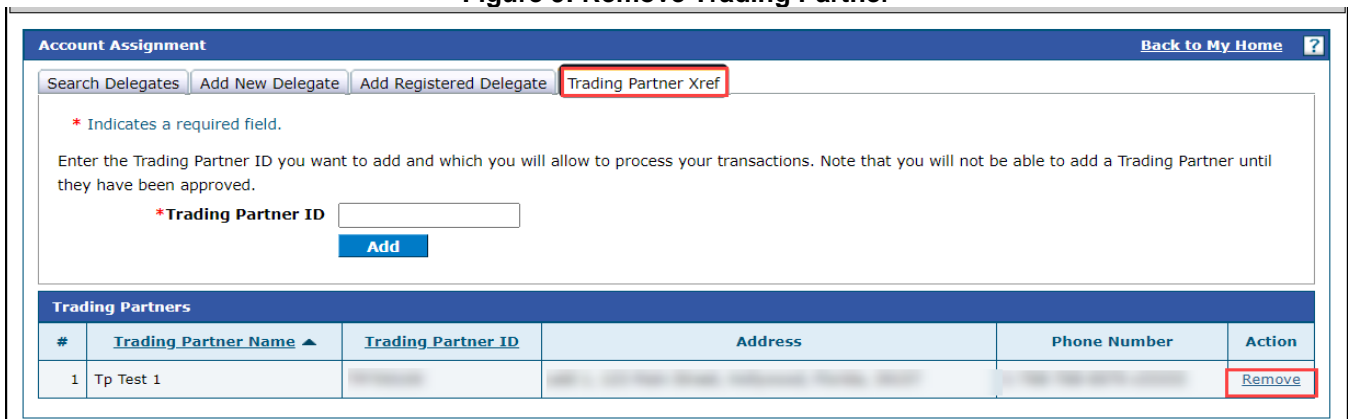
Trading Partner Assignment [Close]

The trading partner has been added to your trading partner list.

OK

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

Figure 9: Remove Trading Partner



Account Assignment Back to My Home ?

Search Delegates | Add New Delegate | Add Registered Delegate | **Trading Partner Xref**

* Indicates a required field.

Enter the Trading Partner ID you want to add and which you will allow to process your transactions. Note that you will not be able to add a Trading Partner until they have been approved.

*Trading Partner ID: **Add**

| Trading Partners | | | | | |
|------------------|------------------------|--------------------|------------|--------------|---------------|
| # | Trading Partner Name ▲ | Trading Partner ID | Address | Phone Number | Action |
| 1 | Tp Test 1 | [Redacted] | [Redacted] | [Redacted] | Remove |

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

Account Assignment Back to My Home ?

Search Delegates | Add New Delegate | Add Registered Delegate | Trading Partner Xref

Last Name Last 4 of DLN Birth Date

First Name Delegate Code Delegate Status

Display Name Days since Last Login Days in Pending Status

Delegates

Click the Delegate's **name** to change the status and/or the functions of the delegate.

| # | Name ▲ | Display Name | Birth Date | Last 4 of DLN | Delegate Code | Status | Days since Last Login | Days in Pending Status |
|---|------------|--------------|------------|---------------|---------------|------------|-----------------------|------------------------|
| 1 | [Redacted] | [Redacted] | [Redacted] | [Redacted] | [Redacted] | [Redacted] | 18 | N/A |
| 2 | [Redacted] | [Redacted] | [Redacted] | [Redacted] | [Redacted] | [Redacted] | N/A | 14 |
| 3 | [Redacted] | [Redacted] | [Redacted] | [Redacted] | [Redacted] | Active | 6 | N/A |

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

Account Assignment Back to My Home ?

Search Delegates | Edit Delegate

Modify the fields below and click the **Submit** button to update the information.

First Name

Last Name

Birth Date

Last 4 of DLN

Delegate Code

*Status Active Inactive

Select the functions that the delegate is authorized to access.
(At least one function must be selected)

*Functions

- Care Management - View Authorization
- Claim - Inquiry
- Member Focus Viewing
- Newborn Enrollment
- Patient Health History
- Payment History - Inquiry
- Treatment History
- Verify Eligibility

- 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

Account Assignment [Back to My Home](#) ?

Search Delegates Edit Delegate

Click **Confirm** to confirm the request. Click **Cancel** to cancel it.

First Name [Redacted]
Last Name [Redacted]
Birth Date [Redacted]
Last 4 of DLN [Redacted]
Delegate Code [Redacted]

Status Inactive

Functions

- Care Management - View Authorization
- Claim - Inquiry
- Member Focus Viewing
- Newborn Enrollment
- Patient Health History
- Payment History - Inquiry
- Treatment History
- Verify Eligibility

Edit **Confirm** **Cancel**

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 |