



DD Brokerage

User Enrollment Form

INSTRUCTIONS: * indicates required fields. The authorizing manager must complete this form based on the employee's specific job duties. Incomplete or illegible forms will not be processed. You may not be notified.

- Send completed form to Info.eXPRS@odhsoha.oregon.gov or fax to 503-947-5044.

*Indicate Action: <input type="checkbox"/> Add User <input type="checkbox"/> Modify User <input type="checkbox"/> Deactivate User <input type="checkbox"/> Change of Info	
*User's Name: (Last, First MI) <i>please print</i>	If user has one, please include your eXPRS login name:
*Job Title:	*Name of Organization:
*Organization Address: (Mailing Address)	*City, State, Zip:
*Phone Number:	*Email Address:

Brokerage Organization User Roles <small>(assign to the Brokerage Organization):</small>		
Brokerage Contracting Roles		
ADD	DEL	User Role/Description
<input type="checkbox"/>	<input type="checkbox"/>	Brokerage IGA Manager – <i>requires completion/submission of separate Brokerage IGA Manager enrollment form to add user role.</i>
<input type="checkbox"/>	<input type="checkbox"/>	Brokerage IGA Coordinator – <i>able to view contract funding related information, such as PAL, SEPA etc., and run various reports.</i>
Brokerage Plan of Care Roles		
ADD	DEL	User Role/Description
<input type="checkbox"/>	<input type="checkbox"/>	Brokerage POC Super User¹ - <i>able to <u>Create/Delete/Update/Submit/Withdraw/Void</u> + <u>SPLIT</u> POC Plan Lines and Service Prior Auths (SPAs); able to <u>Create/Delete/Update/Submit</u> + <u>VOID</u> POC Service Delivered (SD) billings; view associated claims information; view client, provider & ER information; run various POC related reports.</i> <i>¹ Successful completion of POC Super User training required prior to role assignment. Please submit certificate of training completion with this UEF. Enrollment of users with this role is limited to 3 staff per BROKERAGE.</i>
<input type="checkbox"/>	<input type="checkbox"/>	Brokerage POC Manager - <i>able to <u>Create/Delete/Update/Submit/Withdraw/Void</u> Plan of Care Plan Lines and Service Prior Auths (SPAs); view POC Service Delivered (SD) billing & associated claims information; view client, provider & ER information; run various POC related reports.</i>

<input type="checkbox"/>	<input type="checkbox"/>	Brokerage POC Preparer - able to <u>Create/Save/Update/Delete</u> draft Plans of Care, Plan Lines and Service Prior Auths (SPAs) only; not able to submit or make edits once the PL/SPA is out of draft status ; view POC Service Delivered (SD) billing & associated claims information; view client, provider & ER information; run various POC related reports.
<input type="checkbox"/>	<input type="checkbox"/>	Brokerage POC Viewer - able to <u>only view</u> Plan of Care Plan Lines and Service Prior Auths (SPAs); view POC Service Delivered (SD) billing & associated claims information; view client, provider & ER information; run various POC related reports.
<input type="checkbox"/>	<input type="checkbox"/>	Brokerage POC Claims Manager - able to <u>Create/Delete/Update/Submit</u> POC Service Delivered (SD) billings; view associated claims information; view POC, Plan Line & SPA information; view client, provider & ER information; run various POC related reports.
<input type="checkbox"/>	<input type="checkbox"/>	Brokerage POC Claims Reviewer - able to <u>Accept/Reject</u> "pending" Service Delivered (SD) billings; view associated claims information; view POC, Plan Line & SPA information.
<input type="checkbox"/>	<input type="checkbox"/>	Brokerage POC Claims Viewer - able <u>only view</u> Service Delivered (SD) billings; view associated claims information; view POC, Plan Line & SPA information.
<input type="checkbox"/>	<input type="checkbox"/>	Brokerage Provider Panel Manager - able to <u>Add/Update/Remove</u> providers from the POC Provider Panel; able to view provider record information; able to run the Provider Status report, the CHC/PEAA Expire report and the Provider/Site Expire report.
<input type="checkbox"/>	<input type="checkbox"/>	Brokerage Provider Viewer - able to view POC Provider Panel; able to view limited provider record information; able to run the Provider Status report, the CHC/PEAA Expire report.
<input type="checkbox"/>	<input type="checkbox"/>	Brokerage Provider EVV Exceptions Manager - able to <u>Add/Update/Remove</u> EVV Exceptions information for PSW Providers.

Brokerage View Only Roles

ADD	DEL	User Role/Description
<input type="checkbox"/>	<input type="checkbox"/>	SIS Brokerage Viewer - able to view Client SIS Assessment
<input type="checkbox"/>	<input type="checkbox"/>	Brokerage eXPRS View Only - able to <u>view only</u> client, CM and CPA services information; view provider information.
<input type="checkbox"/>	<input type="checkbox"/>	Brokerage eXPRS Report Access Only - able to run various eXPRS reports.

Brokerage PA Case Management User Roles

(assign to Brokerage CM Provider):

PA Case Management Services Roles

ADD	DEL	User Role/Description
<input type="checkbox"/>	<input type="checkbox"/>	CM Personal Agent – adds name of Personal Agent to applicable system dropdowns for selection on RFFS claims, DDEE forms, etc. <u>No user system access permissions associated with this role.</u>

<input type="checkbox"/>	<input type="checkbox"/>	PA CPA Manager² - able to <u>Create/Delete/Submit/Update/Void</u> client SE148 CM service CPAs; view related client and CM service information; run CM service and CM/RFFS payment reports. <i>² The same user should not have this role & <u>PA Encounter Manager</u> role assigned at the same time.</i>
<input type="checkbox"/>	<input type="checkbox"/>	PA CPA Preparer - able to <u>Create/Delete/Edit</u> , but not Submit Draft SE148 CM service CPAs or <u>Edit/Void</u> Approved SE 148 CM service CPAs; view related client and CM service information; run CM service and CM/RFFS payment reports.
<input type="checkbox"/>	<input type="checkbox"/>	PA Encounter Manager³ - able to <u>Create/Delete/Update/Submit/Void</u> SE148 CM RFFS claims; view related client and CM service information; run CM service and CM/RFFS payment reports. <i>³ The same user should not have this role & <u>PA CPA Manager</u> role assigned at the same time.</i>

DD Eligibility Enrollment (0337) Form Roles

ADD	DEL	User Role/Description
<input type="checkbox"/>	<input type="checkbox"/>	Brokerage Eligibility Enrollment Processor - able to <u>Complete/Update/Accept/Reject</u> Brokerage DD Eligibility Enrollment (0337) form Section 3A; view client information.
<input type="checkbox"/>	<input type="checkbox"/>	Brokerage Eligibility Enrollment Viewer - able to <u>view only</u> Brokerage DD Eligibility Enrollment (0337) form; view client information.

Oregon Needs Assessment (ONA) Roles

ADD	DEL	User Role/Description
<input type="checkbox"/>	<input type="checkbox"/>	Brokerage ONA PA⁴ - able to <u>Create/Delete/Update/Submit/Void</u> + <u>Approve/Reject</u> ONA Assessment; view client, POC, SPA; view provider information. <i>⁴ This role cannot be assigned until the user completes/sends in their three required ONA training certificates along with completed User Enrollment Form.</i>
<input type="checkbox"/>	<input type="checkbox"/>	Brokerage ONA Assessor⁵ - able to <u>Create/Delete/Update/Submit/Void</u> ONA Assessment; view client, POC, SPA; view provider information. <i>⁵ This role cannot be assigned until the user completes required in-person training with ODDS.</i>
<input type="checkbox"/>	<input type="checkbox"/>	Brokerage ONA Viewer - able to <u>only view</u> ONA Assessment; view client, POC, SPA; view provider information.

Signature		
Manager: (Print Name)	Phone Number:	Ext.:
Manager Title:	Email Address:	
Manager Signature:	Date: / /	

STATE SECURITY ADMINISTRATOR USE ONLY

Name:

Date Completed:

/ /

Maintain form in local file for audit purposes.