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:** ☐ **Add User** ☐ **Modify User** ☐ **Deactivate User** ☐ **Change of Info**	
*User's Name: (Last, First MI) *please print*	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 *(assign to the Brokerage Organization):*

Brokerage Contracting Roles

ADD	DEL	User Role/Description
	☐	**Brokerage IGA Manager** – ***requires completion/submission of separate Brokerage IGA Manager enrollment form to add user role.***
☐	☐	**Brokerage IGA Coordinator** – *able to view contract funding related information, such as PAL, SEPA etc., and run various reports.*

Brokerage Plan of Care Roles

ADD	DEL	User Role/Description
☐	☐	**Brokerage POC Super User**[1] - *able to* ***Create/Delete/Update/Submit/ Withdraw/Void*** *+* ***SPLIT*** *POC Plan Lines and Service Prior Auths (SPAs); able to* ***Create/Delete/Update/Submit*** *+* ***VOID*** *POC Service Delivered (SD) billings; view associated claims information; view client, provider & ER information; run various POC related reports.* [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.*
☐	☐	**Brokerage POC Manager** - *able to* ***Create/Delete/Update/Submit/ Withdraw/Void*** *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.*

☐	☐	**Brokerage POC Preparer -** *able to* ***Create/Save/Update/Delete*** ***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.*
☐	☐	**Brokerage POC Viewer -** *able to* ***only view*** *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.*
☐	☐	**Brokerage POC Claims Manager -** *able to* ***Create/Delete/Update/Submit*** *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.*
☐	☐	**Brokerage POC Claims Reviewer -** *able to* ***Accept/Reject*** *"pending" Service Delivered (SD) billings; view associated claims information; view POC, Plan Line & SPA information.*
☐	☐	**Brokerage POC Claims Viewer -** *able* ***only view*** *Service Delivered (SD) billings; view associated claims information; view POC, Plan Line & SPA information.*
☐	☐	**Brokerage Provider Panel Manager -** *able to* ***Add/Update/ Remove*** *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.*
☐	☐	**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.*
☐	☐	**Brokerage Provider EVV Exceptions Manager** *– able to* ***Add/Update/ Remove*** *EVV Exceptions information for PSW Providers.*

Brokerage View Only Roles

ADD	DEL	User Role/Description
☐	☐	**SIS Brokerage Viewer -** *able to view Client SIS Assessment*
☐	☐	**Brokerage eXPRS View Only -** *able to* ***view only*** *client, CM and CPA services information; view provider information.*
☐	☐	**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
☐	☐	**CM Personal Agent –** *adds name of Personal Agent to applicable system dropdowns for selection on RFFS claims, DDEE forms, etc.* ***No user system access permissions associated with this role.***

☐	☐	**PA CPA Manager**[2] - *able to* ***Create/Delete/Submit/Update/Void*** *client SE148 CM service CPAs; view related client and CM service information; run CM service and CM/RFFS payment reports.* *[2] **The same user should not have this role & PA Encounter Manager role assigned at the same time.***
☐	☐	**PA CPA Preparer** - *able to* ***Create/Delete/Edit, but not Submit*** *Draft SE148 CM service CPAs or* ***Edit/Void*** *Approved SE 148 CM service CPAs; view related client and CM service information; run CM service and CM/RFFS payment reports.*
☐	☐	**PA Encounter Manager**[3] - *able to* ***Create/Delete/Update/Submit/Void*** *SE148 CM RFFS claims; view related client and CM service information; run CM service and CM/RFFS payment reports.* *[3] **The same user should not have this role & PA CPA Manager role assigned at the same time.***

DD Eligibility Enrollment (0337) Form Roles

ADD	DEL	User Role/Description
☐	☐	**Brokerage Eligibility Enrollment Processor** - *able to* ***Complete/Update/Accept/Reject*** *Brokerage DD Eligibility Enrollment (0337) form Section 3A; view client information.*
☐	☐	**Brokerage Eligibility Enrollment Viewer** - *able to* ***view only*** *Brokerage DD Eligibility Enrollment (0337) form; view client information.*

Oregon Needs Assessment (ONA) Roles

ADD	DEL	User Role/Description
☐	☐	**Brokerage ONA PA**[4] - *able to* ***Create/Delete/Update/Submit/Void*** + ***Approve/Reject*** *ONA Assessment; view client, POC, SPA; view provider information.* *[4] **This role cannot be assigned until the user completes/sends in their three required ONA training certificates along with completed User Enrollment Form. A user cannot be assigned this role and the Brokerage ONA Assessor role at the same time.***
☐	☐	**Brokerage ONA Assessor**[5] - *able to* ***Create/Delete/Update/Submit/Void*** *ONA Assessment; view client, POC, SPA; view provider information.* *[5] **This role cannot be assigned until the user completes required in-person training with ODDS. A user cannot be assigned this role and the Brokerage ONA PA role at the same time.***
☐	☐	**Brokerage ONA Viewer** - *able to* ***only view*** *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.