State or ODDS Staff User Enrollment Form

INSTRUCTIONS: * indicates required fields. The authorizing manager must complete this form based on the employee's specific job duties. Access to Service Elements is determined by your Organization and roles.

- Send completed form to info.exprs@state.or.us or 503-947-5044.

*Indicate Action: ☐ Add User ☐ Modify User ☐ Deactivate User ☐ Change of Info	
*User's Name: *(Last, First MI) (Print Name)*	Already have an eXPRS login name?
*Job Title:	*Name of Organization:
*Organization Address: *(Mailing Address)*	*City, State Zip:
*Phone Number:	*Email Address:

State ODDS Staff User Roles

State eXPRS Contracting/Funding Management Roles

ADD	DEL	Role Name/Description
☐	☐	**State Contract Creator** • ***View:*** Service Element • ***Create, Delete, Update:*** Contact, Party • ***Create, Update, View:*** Contract • ***Create, Delete, Update, View:*** Local Authority
☐	☐	**State Contract Updater** • ***View:*** Service Element • ***Update, View:*** Contract, Local Authority • ***Update:*** Party
☐	☐	**State Contract Manager** • ***View:*** Service Element • ***Update, View:*** Contract, Local Authority • ***Update:*** Party
☐	☐	**State PAL Creator** • ***View:*** Budget Allocation Item, Contract, Service Element, SEPA Line Item • ***Create, Delete, Update, View:*** Program Area Limitation
☐	☐	**State PAL Updater** • ***View:*** Contract, Service Element • ***Update, View:*** Program Area Limitation

☐	☐	### State BA Worksheet Creator • ***View:*** *Client Eligibility, Contract, Program Code, Service Element* • ***Create, Delete, Submit, Update, View:*** *Budget Allocation Worksheet* • ***Create, Delete, Update, View:*** *Budget Allocation Item* • ***Create, View:*** *Client* • ***Run Reports****: Budget Allocation Review, Client Enrollment, CPA Unclaimed Balance, Payment Detail, Provider Payment Summary, Remittance Advice, Remittance Advice Monthly, SE 54 Daily Claims, Suspended Claim*
☐	☐	### State SEPA Creator • ***View:*** *Budget Allocation Item, Contract, Program Area Limitation, Service Element* • ***Create, Update, View:*** *SEPA Line Item* • ***Create, Delete, Update, View:*** *SEPA Approval Unit* • ***Run Reports****: Budget Allocation Review, Client Enrollment, CPA Unclaimed Balance, Payment Detail, Provider Payment Summary, Remittance Advice, SEPA Detail, SE 54 Daily Claims, Suspended Claim*
☐	☐	### State SEPA Submitter • ***View:*** *Budget Allocation Item, Contract, Program Area Limitation, Service Element, SEPA Line Item* • ***Submit, View, Void, Withdraw:*** *SEPA Approval Unit* • ***Run Reports****: Client Enrollment, CPA Unclaimed Balance, Payment Detail, Provider Payment Summary, Remittance Advice, Remittance Advice Monthly, SE 54 Daily Claims, SEPA Detail, Suspended Claim*
☐	☐	### State SEPA First Reviewer • ***View:*** *Budget Allocation Item, Contract, Program Area Limitation, Service Element, SEPA Line Item* • ***First Review, View, Void, Withdraw:*** *SEPA Approval Unit* • ***Run Reports****: Client Enrollment, CPA Unclaimed Balance, Payment Detail, Provider Payment Summary, Remittance Advice, Remittance Advice Monthly, SE 54 Daily Claims, SEPA Detail, Suspended Claim*
☐	☐	### State SEPA Signer • ***View:*** *Budget Allocation Item, Contract, Program Area Limitation, Service Element, SEPA Line Item* • ***Second Review, View, Void, Withdraw:*** *SEPA Approval Unit* • ***Run Reports****: Client Enrollment, CPA Unclaimed Balance, Payment Detail, Provider Payment Summary, Remittance Advice, Remittance Advice Monthly, SE 54 Daily Claims, SEPA Detail, Suspended Claims*
☐	☐	### State SEPA Manager • ***View:*** *Budget Allocation Item, Contract, Program Area Limitation, Service Element, SEPA Line Item* • ***Delete, First Review, Second Review, Update, View, Void, Withdraw:*** *SEPA Approval Unit* • ***Run Reports****: Client Enrollment, CPA Unclaimed Balance, Payment Detail, Provider Payment Summary, Remittance Advice, Remittance Advice Monthly, SE 54 Daily Claims, SEPA Detail, Suspended Claims*
☐	☐	### State SEPA Acceptor • ***For SEs****: 44, 45, 49, 50, 51, 52, 53, 54, 56, 57, 58, 141, 142, 143, 147, 149, 150, 151, 156* • ***View:*** *Budget Allocation Item, Contract, Program Area Limitation, Service Element, SEPA Line Item* • ***Accept/Reject, Delete, First Review, Second Review, Submit, Update, View, Void, Withdraw:*** *SEPA Approval Unit* • ***Run Reports****: Client Enrollment, CPA Unclaimed Balance, Payment Detail, Provider Payment Summary, Remittance Advice, Remittance Advice Monthly, SE 54 Daily Claims, SEPA Detail, Suspended Claim*
☐	☐	### State SEPA Accepted Notification • ***View:*** *Budget Allocation Item, Contract, Program Area Limitation, Service Element, SEPA Approval Unit, SEPA Line Item*

ADD	DEL	
☐	☐	### State FFS PPA Manager • ***View:*** *Contract, Provider, Provider Liability Account, Provider Service Location, Service Element, SEPA Approval Unit, SEPA Line Item* • ***Create, Delete, First Review, Second Review, Submit, Update, View, Void, Withdraw:*** *Provider Prior Auth* • ***Run Reports****: Outstanding Provider Liability, SEPA Detail*
☐	☐	### State Allotment PPA Manager • ***View:*** *Contract, Encounter, Provider, Provider Liability Account, Provider Service Location, Service Element, SEPA Approval Unit, SEPA Line Item* • ***Create, Delete, First Review, Second Review, Submit, Update, View, Void, Withdraw:*** *Provider Prior Auth* • ***Run Reports****: CM Enrollment, CM Fiscal, CM Participation, CM Provider Financial Statement, FFS Full General Fund Payments, Outstanding Provider Liability, PPA Unpaid Allotment, RFFS Claims Summary, RFFS Fiscal, RFFS Funding, RFFS Participation, RFFS Payment Detail, RFFS Provider Payment Summary*
☐	☐	### State Allotment PPA Approver (CAU) • ***For SEs****: 02, 44, 48, 49, 55, 58, 146, 147, 148, 149, 150, 151, 157* • ***View:*** *Budget Allocation Item, Budget Allocation Worksheet, Contract, Encounter, Provider, Provider Liability Account, Provider Service Location, Service Element, SEPA Approval Unit, SEPA Line Item* • ***Accept/Reject, Delete, Second Review, Submit, Update, View, Void, Withdraw:*** *Provider Prior Auth* • ***Run Reports****: CM Enrollment, CM Fiscal, CM Participation, CM Provider Financial Statement, FFS Full General Fund Payments, Outstanding Provider Liability*
☐	☐	### State Out of Cycle Processor • ***View/Update****: Out of Cycle*
☐	☐	### State Rate Increase Runner • ***View:*** *Service Element* • ***Submit:*** *Rate Increase* • ***Accept/Reject, Create, Submit, Update, View:*** *Client Prior Auth*

State eXPRS Accounting & Finance Services Management Roles

ADD	DEL	Role Name/Description
☐	☐	### State Allotment PPA Approver (Acctg) • ***For SEs****: 53, 56, 57, 156* • ***View:*** *Budget Allocation Item, Budget Allocation Worksheet, Contract, Encounter, Provider, Provider Liability Account, Provider Service Location, Service Element, SEPA Approval Unit, SEPA Line Item* • ***Accept/Reject, Delete, Second Review, Submit, Update, View, Void, Withdraw:*** *Provider Prior Auth* • ***Run Reports****: CM Enrollment, CM Fiscal, CM Participation, CM Provider Financial Statement, FFS Full General Fund Payments, Outstanding Provider Liability*
☐	☐	### State Payee Updater • ***View:*** *Provider, Provider Extended, Service Element* • ***Create, Delete, Update, View:*** *Payee*
☐	☐	### State Funding Formula Creator • ***View:*** *Contract, Service Element* • ***Create, Delete, Update, View:*** *Claim Funding, Funding Rule* • ***Run Reports****: CM Fiscal, CM Funding, CM Participation, FFS Full General Fund Payments, SFMA Interface Detail, SFMA Interface Summary*

State eXPRS Foundational Data Management Roles

ADD	DEL	Role Name/Description
☐	☐	**State Service Determination Manager** • ***View:*** Service Element • ***Create, View, Update:*** Service Determination
☐	☐	**State Rate Manager** • ***View:*** Service Element • ***Create, View, Update:*** Rate
☐	☐	**State Program Codes Maintenance** • ***View:*** Service Element • ***Create, Delete, Update, View:*** Program Code

State eXPRS Provider Record/Credential Management Roles

ADD	DEL	Role Name/Description
☐	☐	**State Licensing Updater** • ***View:*** Client Prior Auth, Provider Service Location, Service Element • ***Update, View:*** Provider, Provider License
☐	☐	**State Provider Creator** • ***View:*** Service Element • ***Create, Delete, Update, View:*** Party, Provider, Provider Service Location
☐	☐	**State CDDP Provider Add/Update** • ***View***: Provider License, Service Element • ***Create/Delete/View/Update***: Party, Provider, Provider Contacts, Provider Extended, Provider Service Location
☐	☐	**State CDDP Provider Credential** • ***Create/Delete/View/Review/Submit/Update/Accept-Reject***: Provider License
☐	☐	**State Provider CPAU, Add/Update** • *This role must be assigned in conjunction with one of the "Provider Role, Add/Update" or "Provider Role, Credential" roles. This role controls which provider types the user is permitted to add/update or create and the other roles contain the actual permissions.*
☐	☐	**State Provider CPAU, Credential** • *This role must be assigned in conjunction with one of the "Provider Role, Add/Update" or "Provider Role, Credential" roles. This role controls which provider types the user is permitted to add/update or create and the other roles contain the actual permissions.*
☐	☐	**State Provider Role, Add/Update** • *This role must be assigned in conjunction with one of the Provider "Add/Update" or "Credential" roles. This role contains the actual permissions; the other roles control which provider types the user is permitted to add/update or create.* • ***View***: Provider License, Service Element • ***Create/Delete/View/Update***: Party, Provider, Provider Contacts, Provider Extended, Provider Panel, Provider Service Location • ***View/Create***: PSW Weekly Hours
☐	☐	**State Provider Role, Credential** • *This role must be assigned in conjunction with one of the Provider "Add/Update" or "Credential" roles. This role contains the actual permissions; the other roles control which provider types the user is permitted to add/update or create.* • ***View:*** PSW Weekly Hours • ***Create/Delete/View/Update:*** Provider Panel • ***Create/Delete/View/Review/Submit/Update/Accept-Reject***: Provider License

ADD	DEL	Role Name/Description
☐	☐	**State Provider Role, Update Only** • *This role must be assigned in conjunction with one of the Provider "Add/Update" or "Credential" roles. This role contains the actual permissions; the other roles control which provider types the user is permitted to add/update or create.* • ***View***: *Provider License, Service Element, PSW Weekly Hours* • ***Delete/View/Update***: *Party, Provider, Provider Contacts, Provider Extended, Provider Panel, Provider Service Location*
☐	☐	**State Provider Caps Manager** • ***View***: *Provider License, Service Element* • ***Create/Delete/View/Update***: *Party, Provider, Provider Contacts, Provider Extended, Provider Panel, Provider Service Location, PSW Weekly Hours*

State eXPRS Client Information & Eligibility Management Roles

ADD	DEL	Role Name/Description
☐	☐	**State CLA Manager** • ***View:*** *Claim, Client, Service Element* • ***Create, Delete, Update, View:*** *Client Liability Account* • ***Run Reports***: *Client Enrollment, CPA Unclaimed Balance, Payment Detail, Provider Payment Summary, Remittance Advice, Remittance Advice Monthly, SE 54 Daily Claims, Suspended Claim*
☐	☐	**State Client Update** • ***Create, Update, View:*** *Client (NOTE: This only updates the client information in the eXPRS tables; it does not update CI information.)* • ***Run Reports***: *Client Discrepancy*
☐	☐	**State Eligibility Enrollment Processor – Super User** • ***Accept/Reject, Review, Update, View:*** *DD Eligibility Enrollment*
☐	☐	**State Eligibility Enrollment D&E Processor** • ***Accept/Reject, Review, Update, View:*** *DD Eligibility Enrollment*
☐	☐	**State Eligibility Enrollment Processor** • ***Accept/Reject, Review, Update, View:*** *DD Eligibility Enrollment*
☐	☐	**State Foster Care Rate Authorizer** • ***View:*** *Client, DD Eligibility Enrollment,* • ***Update, View:*** *DD Eligibility Enrollment Foster Care*
☐	☐	**State Foster Care Processor** • ***View:*** *Client, Party* • ***Update, View:*** *DD Eligibility Enrollment* • ***Accept/Reject, Update, View:*** *DD Eligibility Enrollment Foster Care*

State eXPRS Client Services Management Roles

ADD	DEL	Role Name/Description
☐	☐	**State CPA Creator** • ***View:*** *Client Eligibility, Client Liability Account, Contract, DD Eligibility, Provider, Provider Service Location, Rate, Service Element, Service Eligibility* • ***Create, View:*** *Client* • ***Create, Delete, Submit, Update, View, Void:*** *Client Prior Auth* • ***Update:*** *Client Prior Auth Rate* • ***Run Reports***: *Client Enrollment, CPA Unclaimed Balance, Payment Detail, Provider Payment Summary, Remittance Advice, Remittance Advice Monthly, SE 54 Daily Claims, Suspended Claim*

☐	☐	**State CPA Approver** • _**View:**_ _Client Eligibility, Contract, DD Eligibility,_ • _Provider, Provider Service Location, Rate, Service Element, Service Eligibility_ • _**Create, View:**_ _Client_ • _**Update:**_ _Client Prior Auth Rate_ • _**Accept/Reject, View:**_ _Client Prior Auth_ • _**Run Reports**: 90 Day Referral Report, Available Monthly Balance, Brokerage Authorization, Client Enrollment, CM Available Monthly Balance, CPA Unclaimed Balance, Payment Detail, Provider Payment Summary, Remittance Advice, Remittance Advice Monthly, SE 54 Daily Claims, Suspended Claim_
☐	☐	**State CPA (PA) Approver** • _**View:**_ _Client Eligibility, Contract, DD Eligibility, Provider, Provider Service Location, Rate, Service Element, Service Eligibility_ • _**Create, View:**_ _Client_ • _**Accept/Reject, View:**_ _Client Prior Auth_ • _**Run Reports**: 90 Day Referral Report, Available Monthly Balance, Brokerage Authorization Report, Client Enrollment, CM Available Monthly Balance, CPA Unclaimed Balance, Payment Detail, Provider Payment Summary, Remittance Advice, Remittance Advice Monthly, SE 54 Daily Claims, Suspended Claim_
☐	☐	**State CPA Override Manager** • _**View:**_ _Client Eligibility, Contract, DD Eligibility, Provider, Provider Service Location, Rate, Service Element, Service Eligibility_ • _**Create, View:**_ _Client_ • _**Accept/Reject, Override, View:**_ _Client Prior Auth_ • _**Run Reports**: 90 Day Referral, Available Monthly Balance, Brokerage Authorization, Client Enrollment, CM Available Monthly Balance, CPA Unclaimed Balance, Payment Detail, Provider Payment Summary, Remittance Advice, Remittance Advice Monthly, SE 54 Daily Claims, Suspended Claim_
☐	☐	**State CPA SE53 Override Manager** • _**View:**_ _Client Eligibility, Contract, DD Eligibility,_ • _Provider, Provider Service Location, Rate, Service Element, Service Eligibility_ • _**Create, View:**_ _Client_ • _**Accept/Reject, Override, View:**_ _Client Prior Auth_ • _**Run Reports**: 90 Day Referral Report, Available Monthly Balance, Brokerage Authorization, Client Enrollment, CM Available Monthly Balance, CPA Unclaimed Balance, Payment Detail, Provider Payment Summary, Remittance Advice, Remittance Advice Monthly, SE 54 Daily Claims, Suspended Claim_
☐	☐	**State CM/PA CPA Manager** • _**View:**_ _Client Eligibility, Contract, DD Eligibility, Encounter, Provider, Provider Service Location, Rate, Service Element, Service Eligibility_ • _**Create, View:**_ _Client_ • _**Create, Delete, Submit, Update, View, Void, Withdraw:**_ _Client Prior Auth_ • _**Update:**_ _Client Prior Auth Rate_ • _**Run Reports**: CM Enrollment, CM Fiscal, CM Participation, CM Provider Financial Statement, FFS Full General Fund Payments_
☐	☐	**State ReBAR CPA Manager** • _**View:**_ _Claim, Client Eligibility, Client Liability Account, DD Eligibility, Provider, Provider Service Location, Rate, Service Element, Service Eligibility_ • _**Create, View:**_ _Client, Contract_ • _**Accept/Reject, Create, Delete, Submit, Update, View, Void:**_ _Client Prior Auth_ • _**Update:**_ _Client Prior Auth Rate_

ADD	DEL	Role Name/Description
☐	☐	### State POC Manager - ***View:*** *Client Eligibility, Contract DD Eligibility, Provider, Provider License, Provider Service Location, Rate, Service Element, Service Eligibility, SIS Assessment* - ***Create, View:*** *Client* - ***Create, Delete, Update, View:*** *Plan of Care* - ***Create, Delete, Submit, Update, View, Void, Withdraw***: *Service Authorization* - ***Run Reports***: *Client Service Authorization*
☐	☐	### State POC Approver - ***View:*** *Client Eligibility, Client Prior Auth, Contract, DD Eligibility, Plan of Care, Provider, Provider Service Location, Rate, Service Element, Service Eligibility* - ***Update:*** *Client Prior Auth Rate* - ***Create, View:*** *Client* - ***Submit, Update, View, Void, Withdraw:*** *Service Authorization* - ***Run Reports***: *90 Day Referral, Available Monthly Balance, Brokerage Authorization, Client Enrollment, CM Available Monthly Balance, CPA unclaimed Balance, Payment Detail, Provider Payment Summary, Remittance Advice, Remittance Advice Monthly, SE54 Daily Claims, Suspended Claim*
☐	☐	### State POC Override Manager - ***View:*** *Client Eligibility, Contract, DD Eligibility, Provider, Provider Service Location, Rate, Service Element, Service Eligibility* - ***Create, View:*** *Client* - ***View, Update:*** *Plan of Care* - ***Override, Submit, Update, View:*** *Service Authorization*
☐	☐	### State POC Super User - ***View***: *Client Eligibility, Contract, DD Eligibility, Level of Care, Provider, Provider License, Provider Service Location, PSW Weekly Hours, Rate, Service Element, Service Eligibility, SIS Assmt* - ***Create/View***: *Client* - ***Create/Delete/View/Update***: *Provider Panel* - ***Create/Delete/View/Submit/Update/Void***: *Claim, Service Delivery* - ***Create/Delete/View/Split/Update***: *Plan of Care* - ***Create/Delete/View/Split/Submit/Update/Void/Withdraw***: *Service Authorization* - ***Update***: *Plan of Care Units, Service Auth Rate, Service Auth Units* - ***Override***: *Client Prior Auth, Plan of Care, Servce Auth*

State eXPRS Payments Management Roles

ADD	DEL	Role Name/Description
☐	☐	### State Claims Manager - ***View:*** *Client, Client Eligibility, Client Liability Account, Client Prior Auth, Contract, Provider, Provider Liability Account, Provider Service Location, Service Element* - ***Create, Submit, Update, View, Void:*** *Claim, Travel Time* - ***Review, Update:*** *Claim Exception* - ***Run Reports***: *Client Enrollment, CPA Unclaimed Balance, Outstanding Provider Liability, Payment Detail, Provider Payment Summary, Remittance Advice, Remittance Advice Monthly, SE 54 Daily Claims, Suspended Claim*

☐	☐	**State Claims Override** • ***View:*** *Client, Client Eligibility, Client Liability Account, Client Prior Auth, Contract, Provider Liability Account, Provider, Provider Service Location, Service Element* • ***Create, Reclass, Submit, Update, View, Void:*** *Claim* • ***Create, Delete, Override, Submit, Update, View, Void:*** *Travel Time* • ***Create, View:*** *Client Prior Auth* • ***Review, Update:*** *Claim Exception* • ***Update:*** *Client Prior Auth Rate* • ***Run Reports***: *Client Enrollment, CPA Unclaimed Balance, Outstanding Provider Liability, Payment Detail, Provider Payment Summary, Remittance Advice, Remittance Advice Monthly, SE 54 Daily Claims, Suspended Claim*
☐	☐	**State CM/PA Encounter Manager** • ***View:*** *Client, Client Prior Auth, DD Eligibility,* • *Provider, Provider Service Location, Rate, Service Element, Service Eligibility* • ***Create, Delete, Review, Submit, Update, View, Void:*** *Encounter (RFFS Claims)* • ***Run Reports***: *CM Enrollment, CM Fiscal, CM Participation, CM Provider Financial Statement, FFS Full General Fund Payments*
☐	☐	**State Allotment Claims Manager** • ***View:*** *Claim Exception, Client, Client Eligibility, Client Liability Account, Client Prior Auth, Contract, Provider, Provider Service Location, Service Element* • ***Create, Submit, Update, View, Void:*** *Claim* • ***Run Reports***: *Client Enrollment, CPA Unclaimed Balance, Payment Detail, Provider Payment Summary, Remittance Advice, Remittance Advice Monthly, Suspended Claim*
☐	☐	**State Allotment Claims Override** • ***View:*** *Client, Client Eligibility, Client Liability Account, Contract, Provider, Provider Liability Account, Provider Service Location, Service Element* • ***Create, Submit, Update, View, Void:*** *Claim* • ***Update, View:*** *Claim Exception* • ***Create, View:*** *Client Prior Auth* • ***Update:*** *Client Prior Auth Rate* • ***Run Reports***: *Client Enrollment, CPA Unclaimed Balance, Payment Detail, Provider Payment Summary, Remittance Advice, Remittance Advice Monthly, Suspended Claim*
☐	☐	**State POC Claims Manager/Override** • ***View***: *Claim, Client, Contract, DD Eligibility, Level of Care, Provider, Provider Liability Account, Provider Service Location, PSW Weekly Hours, Rate, Service Auth, Service Element, Service Eligibility* • ***Create/Delete/View/Submit/Update/Void/Accept-Reject/Override***: *Service Delivery*
☐	☐	**State Mass Claims Adjuster** • ***View:*** *Claim Funding, Service Element* • ***Update, View:*** *Claim* • ***Review:*** *Claim Exception* • ***Run***: *Claim Mass Adjustment*
☐	☐	**State PLA Manager** • ***View:*** *Claim, Provider, Service Element* • ***Review, View:*** *Encounter* • ***Create, Delete, Update, View:*** *Provider Liability Account* • ***Run Reports***: *CM Enrollment, CM Fiscal, CM Participation, CM Provider Financial Statement, CPA Unclaimed Balance, FFS Full General Fund Payments, Outstanding Provider Liability, Payment Detail, Provider Payment Summary, Remittance Advice, Remittance Advice Monthly, Suspended Claim*

ADD	DEL	Role Name/Description
☐	☐	**State Paper Claims Entry** • ***View:*** *Client, Client Liability Account, Client Prior Auth, DD Eligibility, Provider Service Location, Rate, Service Element, Service Eligibility* • ***Create, Delete, Submit, Update, View, Void:*** *Claim*
☐	☐	**State SD Importer** • ***View:*** *Client, Client Liability Account, Client Prior Auth, DD Eligibility, Provider Service Location, Rate, Service Element, Service Eligibility* • ***Create/Delete/View/Run/Submit/Update/Void/Accept-Reject/Override****: Service Delivery* • ***Run Reports****: Payment Detail, Provider Pmt Summary, Remittance Advice, Suspended Claim*

State eXPRS System Maintainer Roles

ADD	DEL	Role Name/Description
☐	☐	**State SFMA Interface Runner** • ***View:*** *Service Element* • ***Run, View:*** *SFMA Interface* • ***Run Reports****: SFMA Interface Detail, SFMA Interface Summary*
☐	☐	**System Maintainer**

State eXPRS Security/User Maintenance Roles

ADD	DEL	Role Name/Description
☐	☐	**State Limited User Maintainer** • ***View****: Permission, Role Permission, Security Group, Security Role, User Account, User Permission* • ***Update****: User Account*
☐	☐	**State User Maintainer** • ***View****: Permission, Provider, Provider Extended, PSW Weekly Hours, Role Permission, Security Group, Security Role, Security Rules, Service Element, User Permission* • ***Create/Delete/View/Update****: User Account, User Role* • ***Run Reports****: All Permissions, All Roles, All Security Admin, Daily Security, Local User Accounts, Monthly Security*
☐	☐	**State Role Manager** • ***Create****: Role Permission* • ***Create/Delete/View/Update****: Security Role*
☐	☐	**State Security Rule Manager** • ***View****: User Role, Security Role* • ***View/Update****: Security Rules*
☐	☐	**State Direct Contract Chief Security Officer** • ***View****: Permission, Role Permission, Security Group, Security Role, Service Element, User Permission* • ***Create****: User Account Template* • ***Create/View****: User Account Limited* • ***Create/Delete/View/Update****: User Account, User Role* • ***Run Reports****: All Permissions, All Roles, All Security Admin, Daily Security, Local User Accounts, Monthly Security*

State eXPRS Assessment/SIS Management Roles

ADD	DEL	Role Name/Description
☐	☐	**State ONA Viewer** • ***View****: Claim, Client, Client Eligibility, Client Liability Account, Client Prior Auth, Contract, DD Eligibility, Encounter, Level of Care, Level of Care Review, Oregon Needs Assmt, ONA RIT, Plan of Care, Program Code, Provider, Provider Prior Auth, Provider Service Location, Rate, Service Element, Service Eligibility*
☐	☐	**State ONA Assessor** • ***View****: Claim, Client, Client Eligibility, Client Liability Account, Client Prior Auth, Contract, DD Eligibility, Encounter, Level of Care, Level of Care Review, Plan of Care, Program Code, Provider, Provider Prior Auth, Provider Service Location, Rate, Service Element, Service Eligibility* • ***Create/Delete/View/Submit/Update/Void****: Oregon Needs Assmt* • ***Create/View****: Oregon Needs Assmt RIT*
☐	☐	**State ONA SC/PA** • ***View****: Claim, Client, Client Eligibility, Client Liability Account, Client Prior Auth, Contract, DD Eligibility, Encounter, Level of Care, Level of Care Review, Plan of Care, Program Code, Provider, Provider Prior Auth, Provider Service Location, Rate, Service Element, Service Eligibility* • ***Create/CopyView****: Oregon Needs Assmt* • ***Create/View****: Oregon Needs Assmt RIT*
☐	☐	**State ONA Overrider** • ***View****: Claim, Client, Client Eligibility, Client Liability Account, Client Prior Auth, Contract, DD Eligibility, Encounter, Level of Care, Level of Care Review, Plan of Care, Program Code, Provider, Provider Prior Auth, Provider Service Location, Rate, Service Element, Service Eligibility* • ***Create/Delete/View/Submit/Update/Void/Accept-Reject/Override****: Oregon Needs Assmt*
☐	☐	**State POC Add On Approver** • ***View****: CIIS Eligibility, Client, Client Eligibility, Contract, DD Eligibility, Level of Care, Plan of Care, Plan of Care Add On, Provider License, Provider Service Location, PSW Weekly Hours, Rate, Service Authorization, Service Element, Service Eligibility, SIS Assessment.* • ***Create/Update****: Plan of Care* • ***Create/Review/Update****: Plan of Care Add On*
☐	☐	**State ONA Print Role** • ***View****: BA Item, BA Worksheet, Claim, Client, Client Eligibility, Client Liability Account, Client Prior Auth, Contract, DD Eligibility, Encounter, Level of Care, Level of Care Review, Oregon Needs Assmt, Plan of Care, PAL, Program Code, Provider, Provider Prior Auth, Provider Service Location, PSW Weekly Hours, Rate, Service Element, Service Eligibility. SEPA Approval Unit, SEPA Line Item*
☐	☐	**State SIS Assessment Specialist** • *Do not assign unless approved by the ReBAR Manager:* • ***View:*** *Client, Service Element, User Role* • ***Update, View:*** *Assessment Appointment* • ***Run Reports****: Assessment Assignment* • *Should not be assigned with the State SIS Assessment Manager, State SIS Assessment Viewer, or State Service Desk roles.*

ADD	DEL	
☐	☐	**State SIS Assessment Manager** • *Do not assign unless approved by the ReBAR Manager:* • **_View:_** *Client, Service Element* • **_Review, Update, View:_** *SIS Assessment* • *Should not be assigned with the State SIS Assessment Assigner or State SIS Assessment Specialist roles.*
☐	☐	**State SIS Assessment Assigner** • *Do not assign unless approved by the ReBAR Manager:* • **_View:_** *Client, Service Element, User Role* • **_Review, View:_** *SIS Assessment* • **_Create, Update, View:_** *Assessment Appointment* • **_Run Reports_**: *Assessment Assignment* • *Should not be assigned with the State SIS Assessment Manager, State SIS Assessment Viewer, or State Service Desk roles.*

State eXPRS VIEW ONLY Roles

ADD	DEL	Role Name/Description
☐	☐	**State Viewer Only** • **_View:_** *All modules in eXPRS.* • **_Run Reports_**: *All reports in eXPRS.*
☐	☐	**State Provider Viewer** • **_View:_** *Party, Provider, Provider Extended, Provider Service Location, Service Element*
☐	☐	**State Provider Viewer Extended** • **_View:_** *Party, Provider, Provider Extended, Provider Service Location, Service Element*
☐	☐	**State PA Viewer** • **_View:_** *Budget Allocation Item, Client, Client Prior Auth, Contract, DD Eligibility, Local Authority, Payee, Plan of Care, Program Area Limitation, Provider, Provider Contacts, Provider Liability Account, Provider Prior Auth, Provider Service Location, Rate, Service Authorization, Service Delivery, Service Element, Service Eligibility, SEPA Approval Unit, SEPA Line Item, Travel Time* • **_Review, View:_** *SIS Assessment* • **_Run Reports_**: *Available Monthly Balance, Biennium Provider Payment, CM Available Monthly Balance, CM Enrollment, CM Funding, Outstanding Provider Liability, PAL Monthly Allocation, PPA Unpaid Allotment, SEPA/CPA Reconciliation*
☐	☐	**State Claims Viewer** • **_View:_** *Claim, Claim Funding, Client Eligibility, Client Liability Account, Client Prior Auth, DD Eligibility, Encounter, Funding Rule, Provider, Provider Contacts, Provider Service Location, Rate, Service Element, Service Eligibility, Travel Time* • **_Run Reports_**: *Client Enrollment, CM Provider Financial Statement, CPA Unclaimed Balance, Payment Detail, Provider Payment Summary, Remittance Advice, Remittance Advice Monthly, SE 54 Daily Claims, Suspended Claim*
☐	☐	**State CM/PA Encounter Viewer** • **_View:_** *Claim Funding, Client, Client Eligibility, Client Liability Account, Client Prior Auth, DD Eligibility, Funding Rule, Provider, Provider Contacts, Provider Service Location, Rate, Service Element, Service Eligibility* • **_Review, View:_** *Encounter (RFFS Claims)* • **_Run Reports_**: *CM Enrollment, CM Fiscal, CM Participation, CM Provider Financial Statement, FFS Full General Fund Payments*
☐	☐	**State DDEE Viewer** • **_View_**: *Client, Client Eligibility, DD Eligibility, DD Elig Enrollment, DD Elig Enrollment Brokerage, DD Elig Enrollment Foster Care, Level of Care, Service Element, Service Eligibility*

ADD	DEL	
☐	☐	**State Kids Foster Care Viewer** • ***View:*** *Client, DD Eligibility Enrollment, DD Eligibility Enrollment Foster Care*
☐	☐	**State Funding Viewer** • ***View:*** *Funding Rule*
☐	☐	**State SIS Assessment Viewer** • *Do not assign unless approved by the ReBAR Manager:* • ***View:*** *Client, Service Element* • ***Review, View:*** *SIS Assessment* • *Should not be assigned with the State SIS Assessment Assigner or State SIS Assessment Specialist roles.*
☐	☐	**State Report View Only Viewer** • ***View****: Contract, Employer Relationships, Provider, Provider Service Location, PSW Weekly Hours,* • ***Run Reports****: all reports*
☐	☐	**State PC20 Report Viewer** ☐ MH ☐ DD • ***View:*** *Party, Service Element* • ***Run Reports****: PC20*
☐	☐	**State User Viewer** • ***View****: Permission, Role Permission, Security Group, Security Role, User Account, User Permission, User Role* • ***Run Reports****: All Permissions, All Roles, All Security Admin, Daily Security, Local User Accounts, Monthly Security*

State eXPRS Reports Roles

ADD	DEL	Role Name/Description
☐	☐	**State Data Reporting** • ***View:*** *Service Element* • ***Run Reports****: CM Participation, Participation Rate*

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

Maintain form in local file for audit purposes