

eXPRS Activity / User Role Matrix for Brokerages

Who do they work for?	What work will they be doing?	The User Enrollment Form needed:	The user role(s) needed: (need at least one):	Organizational Assignment Level
<i>Below are the minimum roles that a BROKERAGE MUST HAVE to conduct business in eXPRS:</i>				
<i>Except where role exclusions are noted, one person can have multiple roles.</i>				
Brokerage	Manage overall security and user access for my organization.	Security Auth Form + Current Board Order	<ul style="list-style-type: none"> Contractor Direct Contract Chief Security Officer 	<i>NOTE: this role can only be assigned by DHS.</i>
Brokerage	Accept a SEPA (accept money from the State).	IGA Manager Form + Current Board Order	<ul style="list-style-type: none"> Brokerage IGA Manager 	<i>NOTE: this role can only be assigned by DHS.</i>
Brokerage	Create, update, submit a PLAN OF CARE (POC) .	Brokerage User Enrollment Form	<ul style="list-style-type: none"> Brokerage POC Manager 	Brokerage Organization/Contractor
Brokerage	To make Retro-active UPDATES to PLAN LINES and/or SPAs in a POC, and VOID SD billing entries.	Local Authority User Enrollment Form	<ul style="list-style-type: none"> Brokerage POC Super User <i>NOTE: ODDS Operations direction is a limit of 3 staff per CME with this role; additional training required.</i>	Brokerage Organization/Contractor
Brokerage	Review and approve/reject PENDING SD BILLING ENTRIES submitted by providers.	Brokerage User Enrollment Form	<ul style="list-style-type: none"> Brokerage POC Claim Reviewer 	Brokerage Organization/Contractor
Brokerage	Manage my Brokerage's POC PROVIDER PANEL , including viewing provider records.	Brokerage User Enrollment Form	<ul style="list-style-type: none"> Brokerage Provider Panel Manager 	Brokerage Organization/Contractor

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Brokerage	Create & submit POC SERVICE DELIVERED (SD) Entries on behalf of other or for “generic” providers for payment.	Brokerage User Enrollment Form	<ul style="list-style-type: none"> • Brokerage POC Claims Manager 	Brokerage Organization/Contractor
Brokerage	Create, save, SUBMIT and/or EDIT an SE148 CPA for the Brokerage’s Case Management services.	Brokerage User Enrollment Form	<ul style="list-style-type: none"> • PA CPA Manager <i>NOTE: Cannot have this role <u>AND</u> also have CM Encounter Manager role.</i> 	Brokerage Case Management Provider
Brokerage	Create, submit, void SE148 RFFS Claims	Brokerage User Enrollment Form	<ul style="list-style-type: none"> • PA Encounter Manager <i>NOTE: Cannot have this role <u>AND</u> also have PA CPA Manager role.</i> 	Brokerage Case Management Provider
Brokerage	Create & submit DD ELIGIBILITY ENROLLMENT (0337) information , submit TXIX waiver forms and SNAP budget pages using eXPRS.	Brokerage User Enrollment Form	<ul style="list-style-type: none"> • Brokerage Eligibility Enrollment Processor 	Brokerage Case Management Provider
Brokerage	Have a Personal Agent name show in the drop down lists for our Brokerage.	Brokerage User Enrollment Form	<ul style="list-style-type: none"> • CM Personal Agent <i>NOTE: This role is used for eXPRS data only. It does <u>NOT</u> give the person access to eXPRS as a stand alone role. User must have another role assigned to have access to eXPRS.</i> 	Brokerage Case Management Provider

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<i>Below are additional/optional roles that BROKERAGES can utilize to do business:</i>				
Brokerage	Manage user access and assign permissions for users in my organization.	Brokerage User Enrollment Form	<ul style="list-style-type: none"> Contractor Security Officer 	Brokerage Organization/Contractor
Brokerage	Update, unlock user accounts and re-set passwords (cannot assign roles/permissions) for users in my organization.	Brokerage User Enrollment Form	<ul style="list-style-type: none"> Contractor User Maintainer 	Brokerage Organization/Contractor
Brokerage	View users who have access to eXPRS for my organization.	Brokerage User Enrollment Form	<ul style="list-style-type: none"> Contractor User Viewer 	Brokerage Organization/Contractor
Brokerage	View SEPA (accept money/funding limits from the State) information only.	Brokerage User Enrollment Form or IGA Manager Form	<ul style="list-style-type: none"> Brokerage IGA Coordinator 	Brokerage Organization/Contractor
Brokerage	Create and save (but not submit) DD ELIGIBILITY ENROLLMENT (0337) information using eXPRS.	Brokerage User Enrollment Form	<ul style="list-style-type: none"> Brokerage Eligibility Enrollment Preparer 	Brokerage Case Management Provider

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Brokerage	View DD ELIGIBILITY ENROLLMENT (0337) information ONLY using eXPRS.	Brokerage User Enrollment Form	<ul style="list-style-type: none"> • Brokerage Eligibility Enrollment Viewer 	Brokerage Case Management Provider
Brokerage	Create & save (but not submit) an SE148 CPA for the Brokerage's Case Management services.	Brokerage User Enrollment Form	<ul style="list-style-type: none"> • PA CPA Preparer 	Brokerage Case Management Provider
Brokerage	View PLANS of CARE (POC).	Brokerage User Enrollment Form	<ul style="list-style-type: none"> • Brokerage POC Viewer 	Brokerage Organization/Contractor
Brokerage	View PSW or other provider records .	Brokerage User Enrollment Form	<ul style="list-style-type: none"> • Brokerage Provider Viewer 	Brokerage Organization/Contractor
Brokerage	View information ONLY that I may need to see as a Personal Agent.	Brokerage User Enrollment Form	<ul style="list-style-type: none"> • Brokerage eXPRS View Only 	Brokerage Organization/Contractor
Brokerage	Be able to access and pull REPORTS only in eXPRS for Brokerage services.	Brokerage User Enrollment Form	<ul style="list-style-type: none"> • Brokerage eXPRS Report Access Only 	Brokerage Organization/Contractor

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Brokerage	Be able to receive eXPRS notifications that a SIS Assessment record has been finalized.	Brokerage User Enrollment Form	<ul style="list-style-type: none"> • SIS Brokerage Viewer 	Brokerage Organization/Contractor
Brokerage	Be able to view finalized SIS Assessment records.	Brokerage User Enrollment Form	<ul style="list-style-type: none"> • SIS Brokerage Viewer • Brokerage IGA Manager • Brokerage IGA Coordinator 	Brokerage Organization/Contractor
			<ul style="list-style-type: none"> • Brokerage CPA Manager • Brokerage CPA Coordinator 	Brokerage Case Management Provider