# **How to Add Delegates to the Master Account**

Master account holders of eKASPER may set up delegates to their accounts to request reports on their behalf. Delegates can only be requested through the master account holder's Administration screens.

Per Cabinet guidelines, effective July 1, 2018, delegates of Law Enforcement master account holders must be added through a 'paper' Delegate Request process. Delegates of Prescriber, APRN, and Pharmacist master account holders may be added automatically by the master account holder without generating any paperwork. Additionally, Judge and CHFS master account holders may not have delegates.

# Click on a step below to quickly jump to that section of this document:

- Step 1 Logon and navigate to administration
- Step 2 Navigate to delegate administration
- Step 3 Delegate request screen
- Step 4 Fill out delegate details

#### **Continued steps for Automatic Process** (to add Prescriber, APRN, and Pharmacist delegates)

- Step 5 Automatic Add Button
- Step 6 Confirmation Page

# Continued steps for Paper Process (to add Law Enforcement delegates)

- Step 5 Review Form
- Step 6 Verify Changes
- Step 7 Close Review Form
- Step 8 Submit/Print
- Step 9 Confirmed Document
- Step 10 Print
- Step 11 Confirmation Page

### **Final Step**

• Step 12 – Repeat or Logout

## To automatically add the Prescriber, APRN, and Pharmacist delegate:

**Step 1:** The master account holder (MAH) must logon to his account and select the 'Administration' link from the navigational menu:

Request Report		Request Repor	t - For Single Patient	
Summary Report	Patient / Subject Details			* Required Field
Administration For technical support please plact eKAS religious velpdesk at 502-2703	First Name * ID Type DOB(mm/dd/yyyy) *	SSN	Last Name * SSN * Click here for Aliases	
	Patient / Subject Addres	s Info		
	Address *		City *	
	State	KY 🔻	Zip Code	
			Click here for Other Addr	resses
	Report Details (Date in n	nm/dd/yyyy format)		
	From Date * To Date *	06/23/2013 <b>※</b> 06/23/2014	Interstate Requests: (Help) Click here for Other States	Border States
	Facility Email Notification	GENERAL HOSPITAL, 55522233	v	
	Submit	Reset		

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**Step 2:** You may either click "Delegate Administration" in the navigational menu or click the Add Delegate hyper-link:



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**Step 3**: Clicking either link re-directs you to the Delegate Request screen. Delegate screens may vary slightly in appearance and requirements, depending on the account type:

**Section (a)**: Personal Information

The delegate's personal information is **required** for this section

Account	Delegate Request								
Maintenance	Please READ the instructi	ions! Most question:	s are answered here	Print Instructions					
Delegate Administration	Personal Information —								
Home Page									
nome Page	First Name*	<u> </u>		Last Name*					
	DOB*			Account Type		Prescrib	per		w
	ID Type*	Driver's Lice	nse	· ID*					
	Degree			Last 4 digit SSN*					
	State Issued	KY		<u> </u>					
, ,	Email Address*								
(a.) 🚤	Mother's maiden name*								
	Address*								
	City* State KY Zip Code*								
	Home Phone*		Requests Per Day	100	Email Notificat	tion	None		
	Pro Lic. /Reg#								
(b.)	DEA#								
	Facility Information								
	Harne	Phone	Fax	Address	City	State	Zip	Select	Active
(c.)	GENERAL HOSPITAL	(555) 222-3300	(555) 222-4040	FACILITY LOCATION	CITY	KY	44444	<u>~</u>	M
	HEALTH CLINIC	(555) 777-8800	(555) 777-9090	CLINIC ADDRESS	CITY	KY	44444	⊽	M
	Delegate Roles								
	■ Request ■ View/P	rint							
	Click the 'Automatically Ad- need to print out the hard-								on, you will
	Automat	ically Add Delegate	е						
	Review Form	Submit / Print /	Application						

**Section** (b): Professional Information

The delegate's professional information is **optional** for the following account types (*please note*: Do not provide the master account holder's information in these fields):

#### Prescriber:

Pro Lic. /Reg #	DEA#	
ARNP:		
Pro Lic. /Reg#		
Pharmacist:		
Pre Lic#		

**Section (c.)**: Facility Information

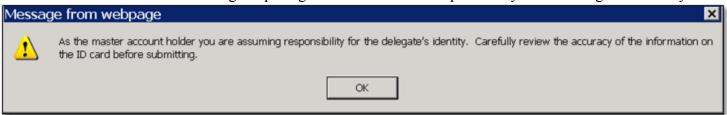
The delegate uses the same facility information as the MAH—it is already on the screen when the screen is opened. Some MAHs have multiple facilities. All active facilities under the MAH's account are checked for the delegate. If the master account holder does not want a delegate to request reports from a particular facility, he must un-check the 'Active' box next to that facility.

**Step 4**: Enter the delegate's information. Asterisks will indicate which fields are required:

Delegate Request							
Please READ the instructions! Most questions are answered here.							
Personal Information							
First Name* Dale	Last Name*	Gate					
DOB* 01/01/1950	Account Type	Prescriber					
ID Type* Driver's Lice	nse v ID*	D98-765-432					
Degree	Last 4 digit SSN*	7777					
State Issued KY	V						
Email Address* ekasperhelp@ky.	gov						
Mother's maiden name* Mom							
Address* Delegate Address							
City*	State KY	Zip Code* 44444					
Home Phone* 555 123 4567	Requests Per Day 100	Email Notification None					

#### Please note:

- Only the last four digits of the SSN are required. SSN is used for identification purposes.
- ID Type defaults on Driver's License; State Issued defaults on KY. If driver's license is used as the ID Type (and the state issued is KY), the driver's license will be checked against the Kentucky Department of Transportation's database.
- If the delegate has an out-of-state driver's license, or if "Other Type" is selected the ID Type, there cannot be verification for the delegate against the Ky. Dept. of Transportation. The master account holder will then receive a message requiring him/her to assume responsibility for the delegate's identity:



**Step 5**: If the delegate's information has been entered, click the Automatically Add Delegate button. If the information provided in the fields does not exactly match the information provided by the Ky. Dept. of Transportation, a message will be received stating there could not be a match found (see below). Verify that all information is correctly entered, make any corrections necessary, and click the Automatically Add Delegate button again.

		Delec	jate Request					
Could not find any match for name, address, and Driver's License in the system. If you are unable to resolve this issue, continue to the paper process. An application form will be generated in a separate window. You will be required to print out this form and follow the instructions per the 3rd page.								
	al Mastausstians	are encured here	Drint Instructions					
Please READ the instruction	is: most questions	are answered here.	Print Instructions					
Personal Information —								
First Name*	Dale		Last Name*		Gate			
DOB*	01/01/1950		Account Type		Prescri	ber		¥
ID Type*	Driver's Licen	se	ID*		D98-78	5-432		
Degree		,	Last 4 digit SSN*		7777			
State Issued	KY							
Email Address*	ekasperhelp@ky.g	104						
	Mom							
Address* Dele	gate Address							
City*		State	KY ▼	Zip Code	e*	4444	4	
	123 4567	Requests Per Day	100	Email N	otificati	On None		•
	,,							
Pro Lic. /Reg #								
DEA#								
Facility Information								
Name	Phone	Fax	Address	City	State	Zip	Select	Active
GENERAL HOSPITAL	(555) 222-3300	(555) 222-4040	FACILITY LOCATION	CITY	KY	44444	✓	✓
HEALTH CLINIC	(555) 777-8800	(555) 777-9090	CLINIC ADDRESS	CITY	KY	44444	✓	<u>~</u>
- Delegate Roles								
■ Request ■ View/Prin	t							
Click the 'Automatically Add I need to print out the hard-co								ou will
	ally Add Delegate							

NOTE: If the message continues despite corrections, the Driver's License verification can be turned off by selecting '---other type---' in the ID Type drop-down field; you will still need to enter the delegate's license information in the ID text field. Click 'OK' to the message requiring the master account holder to assume responsibility for the delegate's identity, then click the Automatically Add Delegate button again.

**Step 6**: When the delegate has been automatically added/approved, a confirmation screen will be received:

Confirmation
The delegate has been approved.
If the delegate has never had an existing account, the delegate should receive two emails with user name assignment and password (one is titled "Welcome to eKASPER"; the other is "Password and instructions for accessing eKASPER") to the email address provided during the Delegate Request process.
If the delegate has a previous delegate account, only the instructions email will be received.
Submit another delegate request

# To request a Law Enforcement delegate account using the 'paper' process:

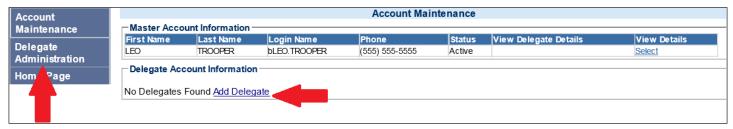
The following will be required to produce the hard-copy application and Terms of Account Use documents in the "paper" Delegate Request process:

- Our users must use Internet Explorer, 5.5 or higher (other browsers, such as Google Chrome, Safari, Opera, or AOL Desktop are not supported by our application). We also allow for Mozilla Firefox, version 12 or higher to support our application.
- Our users must allow pop-ups and cookies from our site. By adding our domain name of <a href="https://ekasper.chfs.ky.gov">https://ekasper.chfs.ky.gov</a> to Trusted Sites and/or to Pop-up Blocker Settings in Internet Options, this will resolve the pop-up blockers within Microsoft Windows. This will not turn off pop-up blockers from other sources (such as the Yahoo! or Google toolbars). The Privacy setting in Internet Options should be set no higher than Medium. The Temporary Internet Files and History Settings in Internet Options should be set to "Automatically" check for newer versions of stored pages.
- Certain mal-ware and anti-spyware may contain elements that prevent cookies from being accepted from our website. Microsoft Defender is one of these products. If you are using Microsoft Defender, please disable it.
- Our users must have Adobe Acrobat Reader, as our reports must open in .pdf. Sometimes, other products may be simultaneously installed with many versions Adobe Reader, such as Google Chrome, Google Chrome toolbar, Adobe AIR or Adobe Manager. Some of these products may interfere with the reports window opening. Multiple versions of Adobe Reader (for instance, having both Adobe Reader 9 and X) will also interfere with the reports window opening.
- If your .pdf window opens blank (or grey), close the window, then re-open. If the issue continues, you might
  want to visit the following troubleshooting site for Adobe: <a href="http://helpx.adobe.com/acrobat/kb/cant-view-pdf-web.html">http://helpx.adobe.com/acrobat/kb/cant-view-pdf-web.html</a>

**Step 1:** The master account holder (MAH) must logon to his account and select the 'Administration' link from the navigational menu:

Request Report	Request Report - For Single Patient				
Summary Report	Patient / Subject Details —			* Required Field	
Status of Requests Administration	First Name *		Last Name *		
For technical support please stact eKAL elpdesk at 502 -2703	ID Type DOB(mm/dd/yyyy)	SSN	SSN Click here for Aliases		
	Patient / Subject Address In	fo-			
	Address		City		
	State	KY 🔽	Zip Code		
			Click here for Other Addre	<u>sses</u>	
	Report Details (Date in mm/	dd/yyyy format)			
	From Date *	12/26/2016			
	To Date *	12/26/2017			
	Facility	KENTUCKY STATE POLICE, PO	ST V		
	Email Notification	None	Case # *		
	Submit	Reset			

**Step 2:** You may either click "Delegate Administration" in the navigational menu or click the Add Delegate hyper-link:

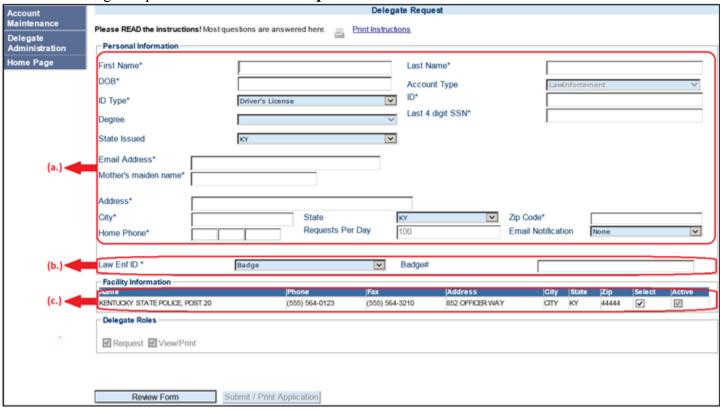


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**Step 3**: Clicking either link re-directs you to the Delegate Request screen. Delegate screens may vary slightly in appearance and requirements, depending on the account type:

# Section (a): Personal Information

The delegate's personal information is **required** for this section



**Section (b)**: Professional Information

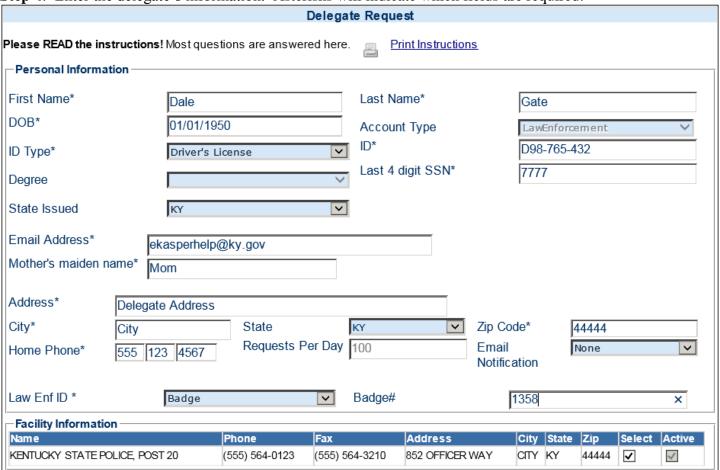
The delegate's professional information is **required** for all Law Enforcement delegates. A drop-down box allows for Badge or Employee ID to be selected as the ID type for the Law Enforcement delegates:



#### **Section (c.)**: Facility Information

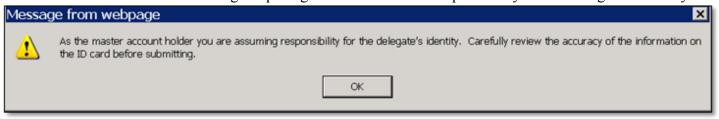
The delegate uses the same facility information as the MAH—it is already on the screen when the screen is opened. Some MAHs have multiple facilities. All active facilities under the MAH's account are checked for the delegate. If the master account holder does not want a delegate to request reports from a particular facility, he must un-check the 'Active' box next to that facility.

**Step 4**: Enter the delegate's information. Asterisks will indicate which fields are required:



#### Please note:

- Only the last four digits of the SSN are required. SSN is used for identification purposes.
- ID Type defaults on Driver's License; State Issued defaults on KY. If driver's license is used as the ID Type (and the state issued is KY), the driver's license will be checked against the Kentucky Department of Transportation's database.
- If the delegate has an out-of-state driver's license, or if "Other Type" is selected the ID Type, there cannot be verification for the delegate against the Ky. Dept. of Transportation. The master account holder will then receive a message requiring him/her to assume responsibility for the delegate's identity:



**Step 5**: If the delegate's information has been entered, click the Review Form button:



**Step 6**: A separate (Adobe) window should "pop-up" containing a document titled "REVIEW FORM—DO NOT SUBMIT". **Please check the form for any necessary corrections!** 



#### REVIEW FORM - DO NOT SUBMIT

#### PERSONAL INFORMATION

	Account	Reg	#:	0
--	---------	-----	----	---

Name:	Dale G	ate		SSN:	7777	DOB	01/01/50	
Address: Delegate Address								
City:		City		State:	KY	Zip:	44444	
Email Address: ekasperhelp@ky.gov		Home Phone Number:		(555) 123-4567				
ID / Driver's License Number:		D98-765-432	KY	Mother's Maiden Name:		Mother's Maiden Name: Mom		

Your home address will be verified using the address as printed on your driver's license. If you live in Kentucky but still have a Driver's License from another state, please select the state that issued your current Driver's License and enter that Driver's License number when you complete the application form.

# PROFESSIONAL CREDENTIALS (Applicable by account type - See instructions for specific requirements)

Badge#:	1358	

# WORK INFORMATION (Note: Only one location is printed; however, all locations will be verified.)

Work Location Name:	KENTUCKY STATE POLICE, POST 20					
Address:	852 OFFICER WAY					
City:	CITY	State:	KY	Zip:	44444	
Work Phone Number:	(555) 564-0123					

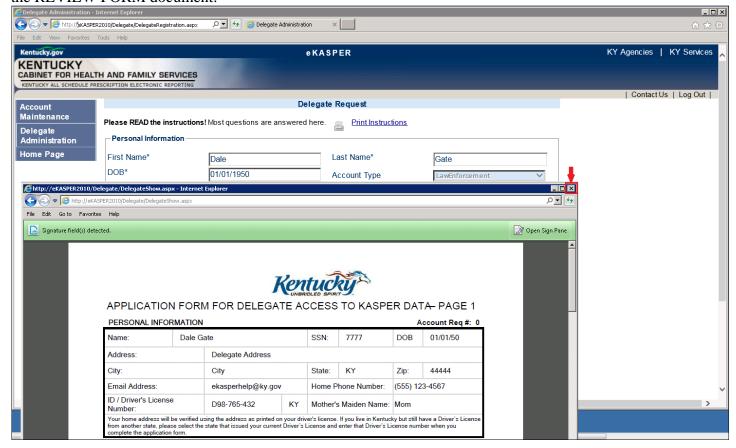
#### FOR OFFICE USE ONLY

Account Type:	LawEnf	Access Level:	Delegate	Submit Date:	06/12/18
				Process Date:	

#### To make corrections:

- Close the Review Form window
- Make the necessary corrections in the proper boxes
- Click the Review Form button again and re-examine the document to ensure the changes were made

**Step 7**: If no corrections are necessary, click the 'X' in the upper right-hand corner of the Adobe window with the REVIEW FORM document:



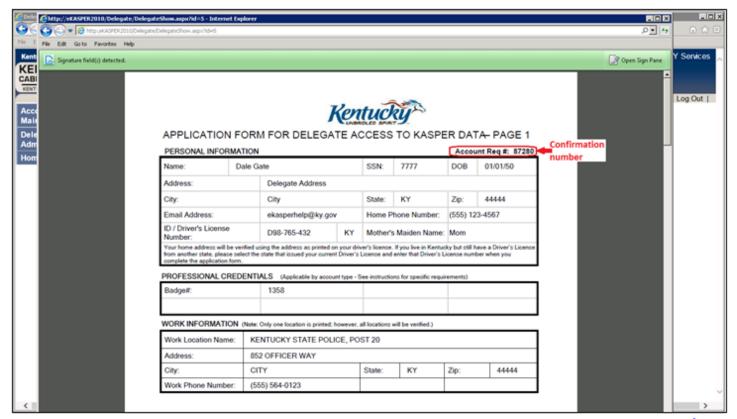
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**Step 8**: Click the 'Submit/Print Application' button:

	Delegate Roles
	■ Request ■ View/Print
[	Review Form Submit / Print Application Reset

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**Step 9**: The Adobe window reopens, with the required hard-copy application form for the delegate. The heading of "**Account Req #:**" in the top-right corner of the document has the delegate's confirmation number printed to the right side:



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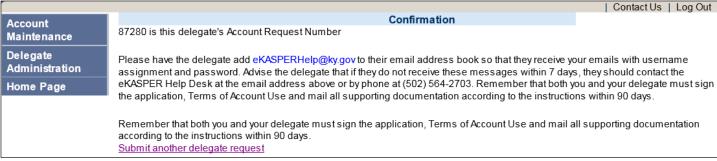
**Step 10**: Print out the APPLICATION FORM FOR ACCESS TO KASPER DATA and Terms of Account Use documents from within the Adobe window:



**NOTE:** A third page of instructions accompanies the application, explaining what to do with the printed documents.

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**Step 11**: The Delegate Request screen has now changed to the confirmation screen:



Step 12: You may now either: Submit another delegate request OR, Log Out