# Using the OMA Tool to Invite-Link-Delink and Manage Credentialing Agent Access to KY Medicaid IDs

**This document provides the steps to send invitations to add users, to link/delink Credentialing Agents (CAs) to a KY Medicaid ID, and manage CA roles within the Organization Management Application (OMA Tool).**

## Overview

All management duties, such as adding or removing users *(linking and delinking)*, will be done through the Organization Management Application.  To link a Credentialing Agent to a Provider or Group's KY Medicaid ID, the Organization Management Application or OMA Tool must be used.

This linking or delinking will be carried out by the **Organization Administrator (Org Admin)**. The Org Admin designation allows the Org Admin to invite and allow other users *(in this case, Credentialing Agents)* to be linked to a KY Medicaid ID and work on their behalf.

The Org Admin could be:

- A designated person within a credentialing organization
    - For example, a large hospital or a credentialing agency
    - May be a Business or Office Manager or the Credentialing Agent Manager

- An individual Provider with a KY MPPA account
    - Providers are automatically designated as an Org Admin for their KY Medicaid IDs

## Opening the Organization Management Application

The Org Admin/Provider will see the Organization Management Application on the KOG Home Page once they have created and validated the Org Admin's Kentucky Online Gateway (KOG) account.

**Note**:  Providers will be granted access to the OMA Tool once their KY Medicaid ID is linked to their SSN.

- For Providers with existing KY Medicaid IDs, this will be done when the Provider sets up their KY MPPA account.
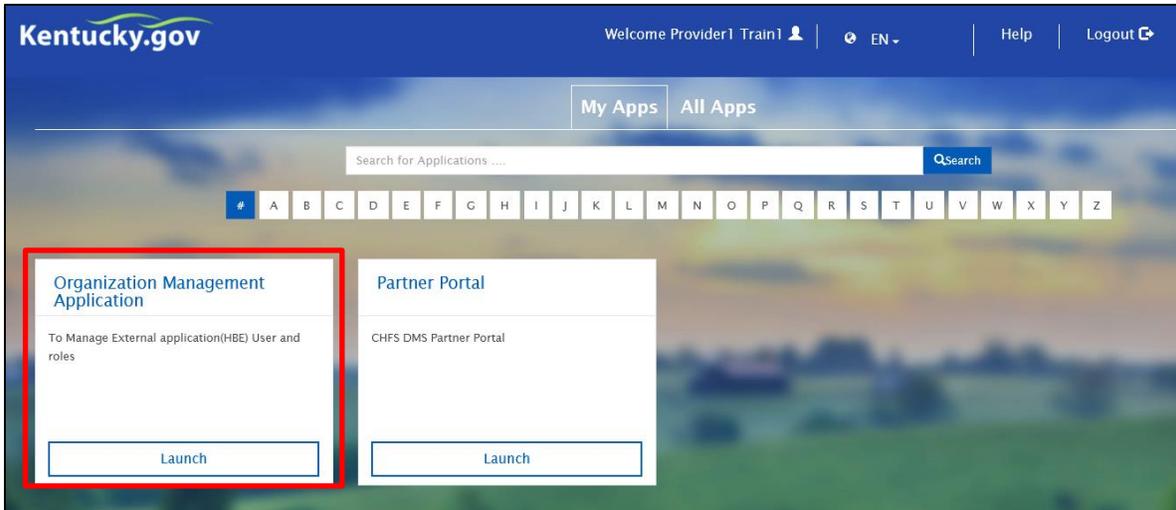- For new Providers, this will be done once their KY Medicaid ID is approved by DMS.

**Figure 1: OMA Tool on KOG Home Page**

Click **Launch** on the *Organization Management Application* tile to open the application.

Once the Organization Management Application (OMA) has been launched, the Org Admin/Provider will see a table with the Organization(s) that can be managed (Figure 2).

**Note**:  *Organization Administrators can only manage Organizations to which they belong.  For Providers, this will only include their linked Medicaid ID(s).  For credentialing organizations, it will include all the Group Medicaid IDs associated with that organization.*


**Figure 2: OMA Tool Organization Listing**

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# Inviting Users Through the Organization Management Application

In the Invite Users tab, an Org Admin can invite a new user or use the search function to find a user that already exists in KOG.

## Step 1 – Select the Organization (Provider or Group) Sending the Invitation

Identify the Organization Name *(Provider Name – Individual or Group)* that will be sending the invitation.  Click on the **Manage** button of the Organization identified.  See Figure 2.

## Step 2 – Open Invite Users Tab

To invite a new Organization User, such as a Credentialing Agent, click on the **Invite Users** tab. See Figure 3.

**Note**:  *At this time, for KY MPPA, only Credentialing Agents or additional Organization Administrators can be invited using the OMA tool.*
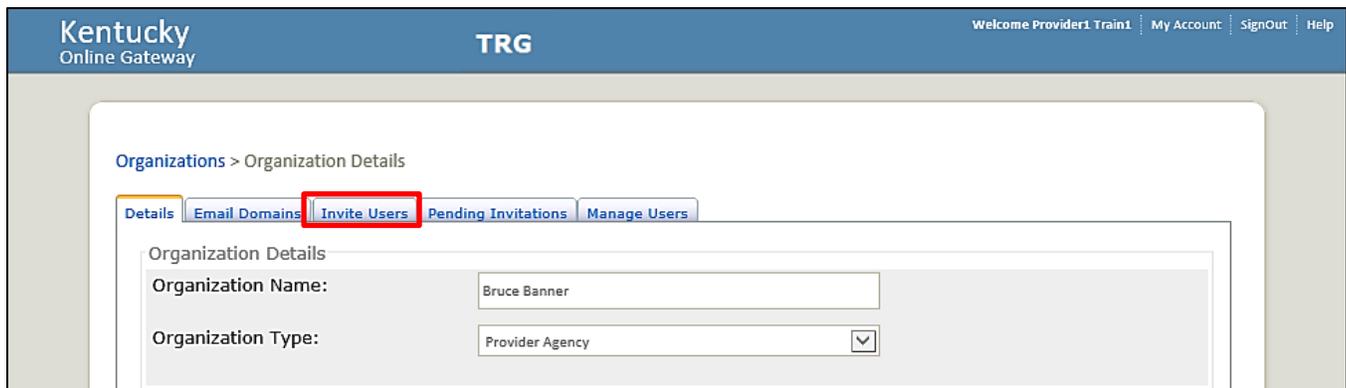


**Figure 3: Invite Users Tab**

## Step 3 – Search for User to Invite/Invite New User

If the user you are inviting already has a KOG account, they can be found using the search function at the top of the screen by putting in their first name, last name, e-mail address, or username and clicking **Search**.

If the user does not have a KOG account, fill out the form for a New User to include first name, last name, and e-mail address.
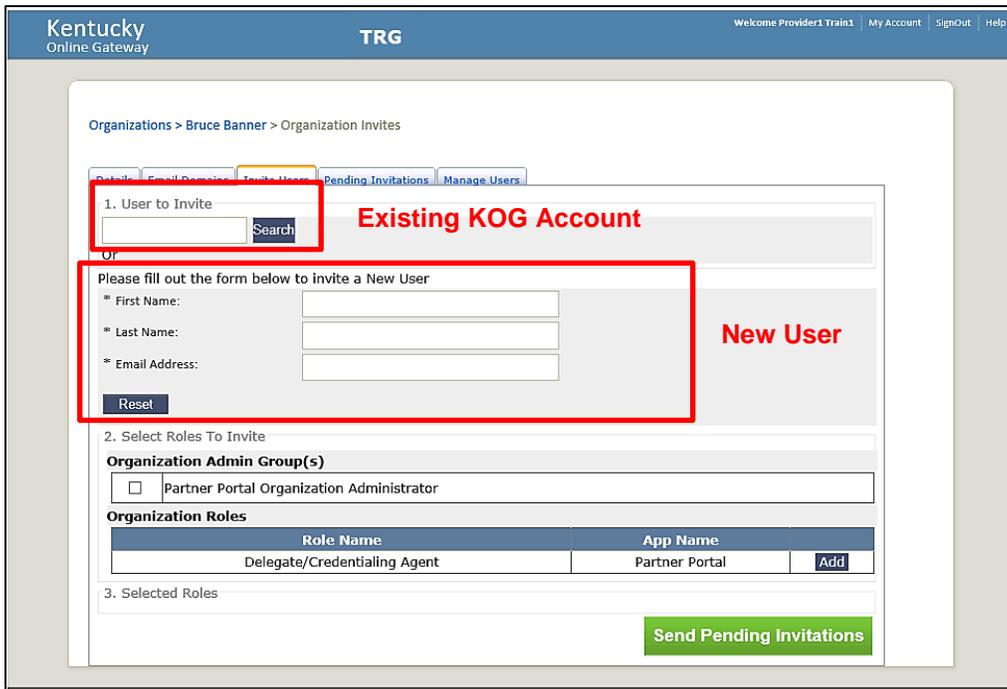
See Figure 4.

**Figure 4: Locate User or Invite New User**

## Step 4 – Send Pending Invitation

After completing the Invitation Form or Selecting an Existing User, click the **Add** button next to Delegate/Credentialing Agent under Organization Roles. See Figure 5.
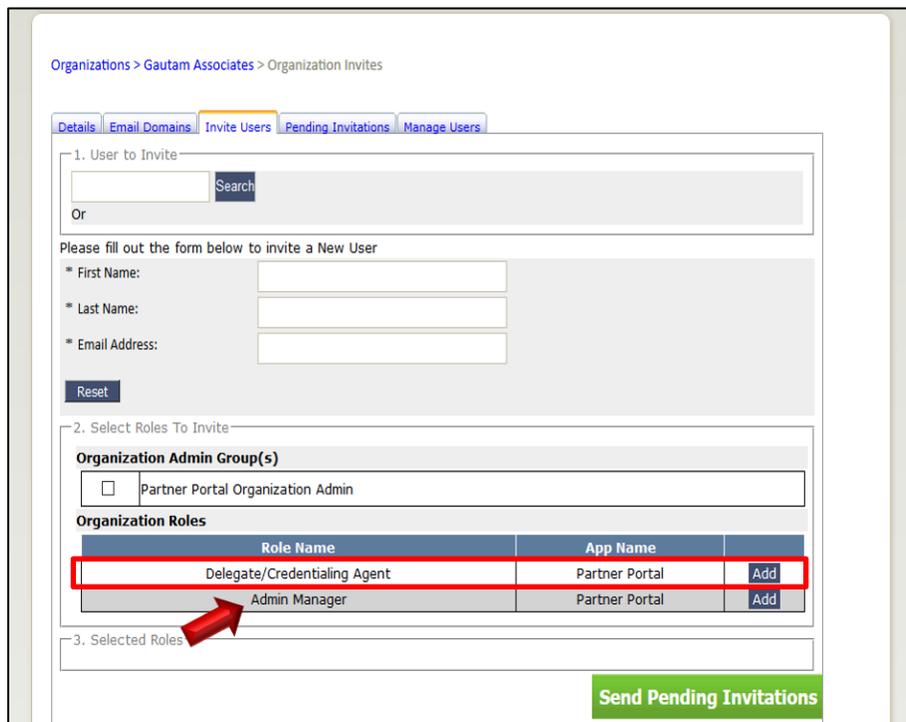

**Figure 5: Select Role**

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**Note**:  *The Delegate term used in OMA is synonymous with Credentialing Agent (CA).  It does not give the CA permission to act as a KY MPPA Authorized Delegate within KY MPPA and electronically sign and submit for the Provider.  To act as an Authorized Delegate within KY MPPA, the CA must have the Provider complete and sign the Authorized Delegate form.*

**Note**:  *The CA Admin Manager role is assigned the same way as the Credentialing Agent. Instead of selecting Add next to Delegate/Credentialing Agent, select Add next to the Admin Manager role (see Figure 5). The Admin Manager will be able to reassign CA workload within KY MPPA as necessary to meet workload requirements.*

After clicking **Add**, the Org Admin will see a pop-up listing the information for the user *(if the user is already in the system)*.  Verify the information and check the box in the Select column to proceed.  See Figure 6.
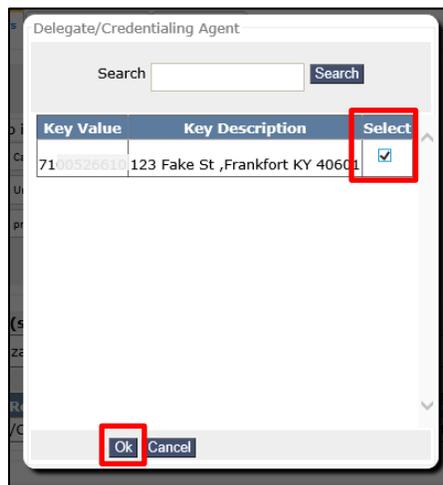


**Figure 6: Select User to Invite**

**Note**:  *The Key Value is the KY Medicaid ID.*

After selecting, click **OK**.  The Delegate/Credentialing Agent role has now been selected for the user (see Figure 7).

Once the roles have been selected, the Org Admin will click the **Send Pending Invitations** button to send the invitation.
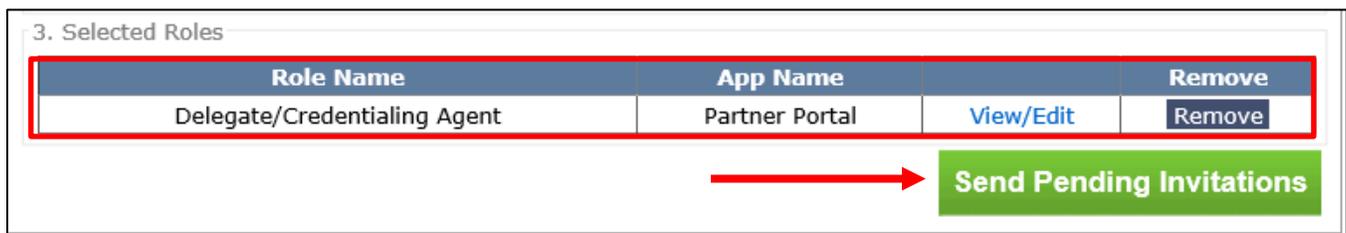


**Figure 7: Send Pending Invitations**

**Note:** *If the User needs to be invited as an Organization Administrator, they will need to be invited by a current Organization Administrator. The current Org Admin will need to check the box next to Partner Portal Organization Administrator under Organization Admin Group(s). See Figure 8.*



**Figure 8: Inviting as Organization Administrator**

## Checking Invitation Status

Once the invitation has been sent, the Organization Administrator will then be automatically redirected to the **Pending Invitations** tab, where they can view the status of the invitations sent. See Figure 9.

- The Org Admin can delete the pending invitation if necessary by clicking the **Delete** button.
- The Org Admin can search for users with pending invitations using the *Invited Users* field and **Search Users** button.

The invited Credentialing Agent will need to accept the email invitation sent to their account and complete the onboarding process for KOG and KY MPPA (registration and account setup).

**Note**: *For more details on the steps to complete the Account Set Up and Sign On processes, see the "Provider and Credentialing Agent Account Set Up" and "Provider and Credentialing Agent Sign On to KY MPPA" job aids in the KY MPPA Training Resources Library.*

**Figure 9: Pending Invitations**

## Linking Credentialing Agents and Providers

Once the OMA invitation has been accepted by the CA, the Credentialing Agent will log in to KY MPPA to complete the linking process.

- Individual Providers:  The Credentialing Agent will be linked to the KY Medicaid ID(s) for the individual Provider when the CA logs in to KY MPPA.

- Providers within a Group: The CA will be linked to all of the individual Providers associated with the Group Medicaid ID when the CA logs in to KY MPPA.

  o  For example, Group Medicaid ID "1234567" has 400 Providers.  When the CA is sent an OMA invitation to join Group "1234567" and logs in to KY MPPA, the CA will be linked to the 400 providers linked to the group and will be able to perform maintenance-related actions.

**Note**:  A Group Medicaid ID will only be associated with one FEIN *(Federal Employer Identification Number)*.  Because an entity may be comprised of multiple groups *(for example - pediatric group, physician group, physical therapist group),* the entity may have multiple FEINs. The CA must be sent separate OMA invitations by the Org Admin for each FEIN (group) they will be supporting.

## Managing Users

Once the invited Organization User *(such as a Credentialing Agent)* has completed the onboarding process, their invitation will be removed from the **Pending Invitations** tab and their record will instead be displayed on the **Manage Users** tab.  See Figure 10.

- Click on the **Manage** button to manage the relationship between the Organization User and the Organization (Provider/Group/Entity) and update a User's roles.

  - From the **Roles** tab (Figure 11), the Org Admin will be able to identify the Medicaid IDs the Credentialing Agent is linked to by viewing the associated KY Medicaid ID listed in the Key Value column.

- Click on the **Remove** button to remove a User from the Organization.



**Figure 10: Manage Users Tab**



**Figure 11: Roles Tab**

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## Delinking Credentialing Agents and Providers/Groups

Credentialing Agents will need to be delinked from an individual Provider or a Group Medicaid ID if:

- The CA leaves the organization or
- The Provider/Group no longer wish them to work on the behalf of their KY Medicaid ID.

To remove access to the Organization and all the Medicaid IDs associated with that group, click on the **Remove** button on the **Manage Users** tab for the specific User to be deleted. See Figure 12.

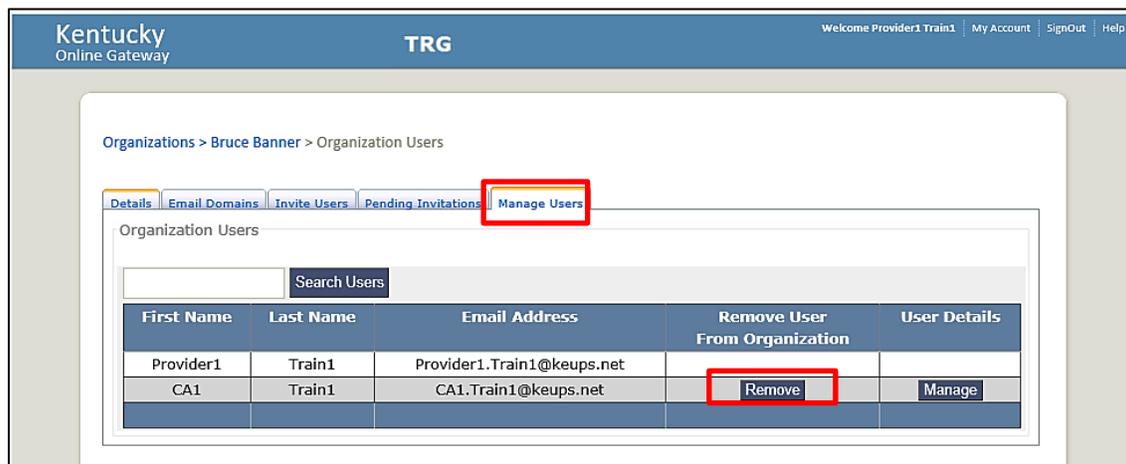**Note**:  *Removing access to the Organization will remove access to all associated Medicaid IDs.*



**Figure 12: Manage Users Tab**

**Note**:  *The user will still have KOG and KY MPPA accounts but they will no longer be able to access the KY Medicaid IDs associated to the Organization.  The access will be removed from KOG immediately; access to KY MPPA will be removed upon the CA's next log in to KY MPPA.*

To remove a CA's access to one particular Medicaid ID, click on the **Remove** button from the **Roles** tab for the desired Medicaid ID.  This will remove the CA's access to only the selected Medicaid ID.  See Figure 13.

**Note**:  *If the Org Admin removes acces to one Group Medicaid ID within their organization, the next time the CA logs into KY MPPA, they will be delinked from all the individual Providers associated with that Group.*

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**Figure 13: Remove from Roles Tab**

**Note**: *This delinking process SHOULD NOT be used to reassign workload between CAs within KY MPPA. Reassigning workload is accomplished by the CA Admin Manager from the Administration tab within KY MPPA. For more information on this process, see the "How to Manage Credentialing Agent Work Assignments" job aid in the KY MPPA Training Resources library.*

## Other Organization Management Application (OMA) Tabs

### Details Tab

The **Details** tab contains view only information including the **Name** and **Type** of the Organization and other details that are configured for that Organization Type.
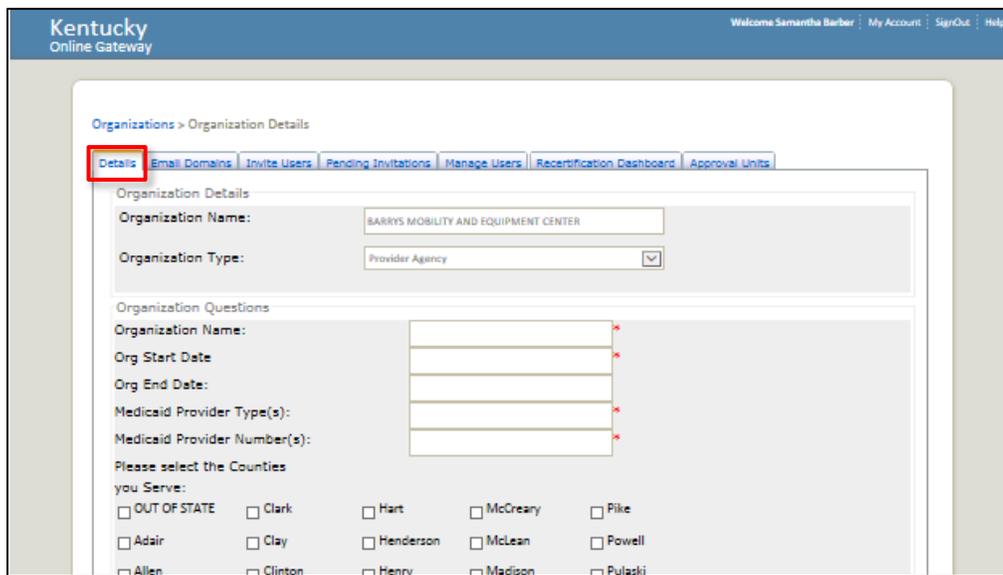


**Figure 14: Details Tab**

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## Email Domains Tab

In the **Email Domains** tab, the Org Admin can add specific email domains for new user invitations, which provides an added measure of security and prevents users outside the added domains from receiving invitations and creating accounts (Figure 15).

Email domains added to the **Allowed Email Domains** list specify which domains are allowed to receive invitations. This functionality is useful if an Organization uses a certain domain for employees and the goal is to limit the invitations to the employees. For example, Kentucky state employees all use the domain *@ky.gov*.
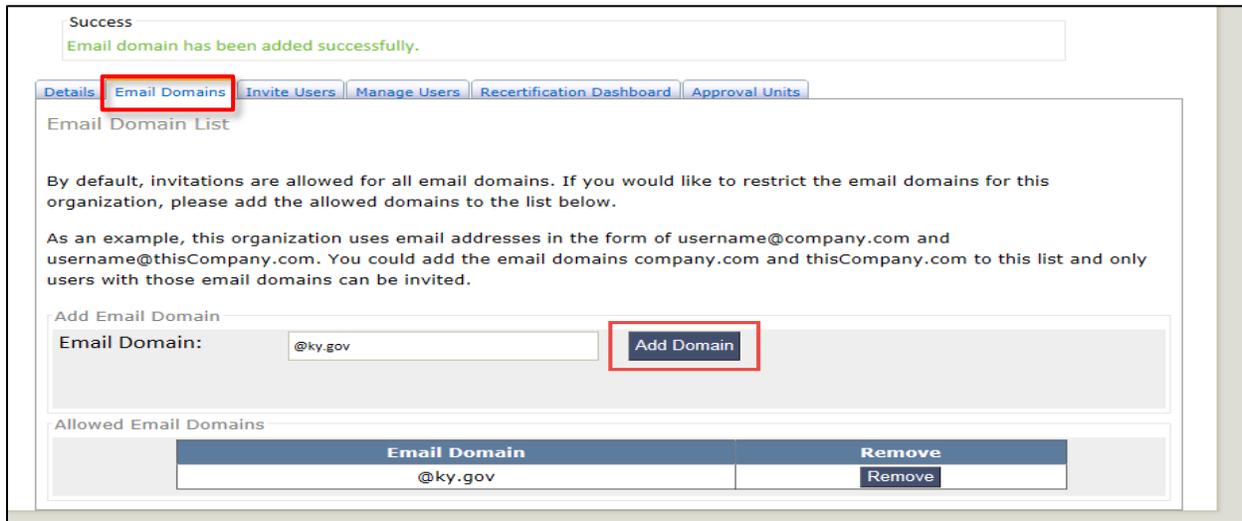


**Figure 15: Email Domains Tab**

**Note:** *If the Org Admin does not add any domains to the **Allowed Email Domains** list, then all email domains will be allowed. The default is blank and any domain can be invited.*

## Recertification Tab

This tab is not applicable to KY MPPA.

## Approval Units Tab

This tab is not applicable to KY MPPA.

## Contact KOG Helpdesk

The **KOG Helpdesk** is available to assist if you run into any issues, such as logging in, username/password retrieval, MFA security tokens, or any other onboarding questions.

Contact them at: KOGHelpdesk@ky.gov or call KOG Helpdesk at 502-564-0104 Ext. 2.