

User Roles and Permissions – Brokerages

This document outlines all roles available to Brokerages, organized by the major types of work that staff may need to perform. It outlines what each role allows a user to do, and helps staff identify which roles best match their specific job duties. This is especially helpful for areas with multiple permission levels, such as Viewer, Preparer, and Manager roles.

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Brokerage – Organizational Level Roles

What do you need to do?	Role	Permissions
Work with Intergovernmental Agreements (IGAs)	Brokerage IGA Coordinator	View: Contract funding (PAL, SEPA etc.) Run: Contract and funding-related reports

and Service Element Prior Authorizations (SEPAs)	Brokerage IGA Manager	<i>Requires approval by an Authorized Board Delegated Signatory. All Brokerage IGA Coordinator permissions, and also -</i> Accept/Reject: Contract and funding allocation information (PAL, SEPA etc.), Individual, Provider, SIS Assessment Information Run: Various Payment and Enrollment reports
Work in the Plan of Care	Brokerage POC Viewer	View: Plans of Care, Plan Lines, Service Prior Authorizations, Service Delivered Billing Entries, Individual, Provider information Run: Plan of Care reports
	Brokerage POC Preparer	<i>All Brokerage POC Viewer permissions, and also -</i> Create/Save/Update/Delete: Draft Plan Lines & Service Prior Authorizations
	Brokerage POC Manager	<i>All Brokerage POC Preparer permissions, and also -</i> Submit/Withdraw/Void: Plan of Care Plan Lines & Service Prior Authorizations; View: Claims, Service Delivered Billing Entries, Individual, Provider information
	Brokerage POC Super User	<i>Requires completion of POC Super User training. Max 3 per Brokerage. All Brokerage POC Manager permissions, and also -</i> Split: Plan of Care Plan Lines and Service Prior Authorizations
Work with Service Delivered Billing Entries and Claims	Brokerage POC Claims Viewer	View: Service Delivered Billing Entries, Claims, Plan of Care, Plan Line, Service Prior Authorization information
	Brokerage POC Claims Reviewer	<i>All Brokerage POC Claims Viewer permissions, and also -</i> Accept/Reject: Pending Service Delivered Billing Entries
	Brokerage POC Claims Manager	<i>All Brokerage POC Claims Reviewer permissions, and also -</i> Create/Delete/Update/Submit: Service Delivered Billing Entries Run: Plan of Care reports
Work with Provider Records	Brokerage Provider Viewer	View: Provider Panel, Limited provider information Run: Provider Status, CHC/PEAA Expire reports

	Brokerage Provider Panel Manager	<i>All Brokerage Provider Viewer permissions, and also -</i> Add/Update/Remove: Provider Panel View: Provider Information Run: Provider-Site Expire reports
	Brokerage Provider EVV Exceptions Manager	Add/Update/Remove: PSW EVV Exceptions
View Specific Information	SIS Brokerage Viewer	View: Individual SIS Assessments
	Brokerage eXPRS View Only	View: Individual, Provider, Case Management and Direct CPA Services information
	Brokerage eXPRS Report Access Only	Run: Various eXPRS reports

Brokerage – Case Management Provider

What do you need to do?	Role	Permissions
Work with Case Management Client Prior Authorizations	PA CPA Preparer	Create/Delete/Edit: Draft Case Management Client Prior Authorizations (SE148) View: Individual and Case Management Service information Run: Case Management Service & RFFS Payment Reports
	PA CPA Manager	<i>Cannot be assigned with PA Encounter Manager. All PA CPA Preparer permissions, and also -</i> Submit/Void: Case Management (SE148) Client Prior Authorizations

Work with Rationed Fee-For-Service (RFFS) Claims	PA Encounter Manager	<i>Cannot be assigned with PA CPA Manager.</i> Create/Delete/Update/Submit/Void: Case Management (SE148) RFFS claims View: Individual and Case Management Service information Run: Case Management Service & RFFS Payment Reports
	CM Personal Agent	No permissions. Adds name to dropdowns for RFFS claims, DDEE forms, etc.
Work with DD Eligibility Enrollment Forms (DDEE / 0337)	Brokerage Eligibility Enrollment Viewer	View: Brokerage DD Eligibility Enrollment (0337), Individual information
	Brokerage Eligibility Enrollment Processor	<i>All Brokerage Eligibility Enrollment Viewer permissions, and also -</i> Complete/Update/Accept/Reject: Section 3a of the Brokerage DD Eligibility Enrollment (0337) Submit/Withdraw: Brokerage DD Eligibility Enrollment (0337)
Work with Oregon Needs Assessments (ONA)	Brokerage ONA Viewer	View: Oregon Needs Assessment, Individual, Provider, Plan of Care, Service Prior Authorization information
	Brokerage ONA PA	<i>Requires 3 ONA training certificates. User cannot also be assigned the Brokerage ONA Assessor role. All Brokerage ONA Viewer permissions, and also -</i> Create/Delete/Update/Submit/Void: Oregon Needs Assessment
	Brokerage ONA Assessor	<i>Requires in-person ODDS training. User cannot also be assigned the Brokerage ONA PA role. All Brokerage ONA Viewer permissions, and also -</i> Create/Delete/Update/Submit/Void: Oregon Needs Assessment