JOB AID
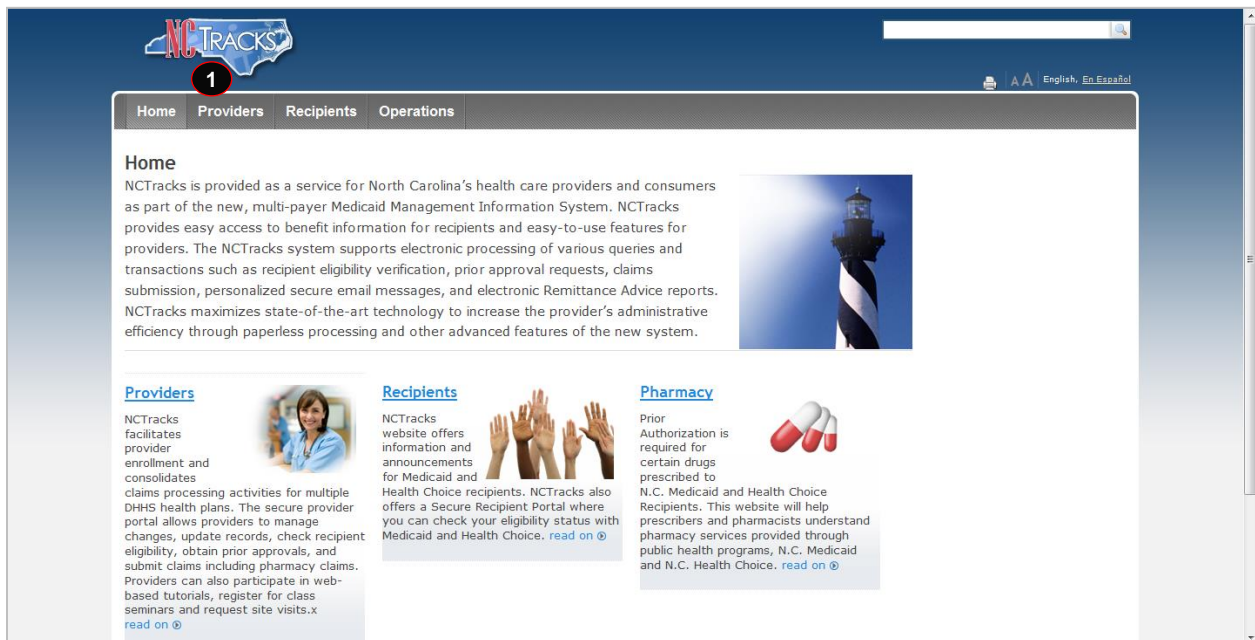## Change Office Administrator Application Process

OVERVIEW

This Job Aid provides instructions on how to change the Office Administrator (OA) associated with a provider's record (National Provider Identifier [NPI] / Atypical ID).

Providers may change their OA when:

- An individual officer for the organization used one NCID to register the organization and all of its individual providers.
- Since registration, an individual officer no longer works for the organization and the OA role needs to be transferred to the individual provider or to the organization's new OA.
- The existing OA left the organization before establishing a new OA.

BEGIN CHANGE OFFICE ADMINISTRATOR APPLICATION

Using a supported browser, navigate to www.nctracks.nc.gov. The public NCTracks home page displays before you are logged in to the system. To log in to the secure NCTracks portal, complete the following steps.

Step	Action
1	Select **Providers**.

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Step	Action
2	Select **Office Administrator (OA) Change Process**.

Step	Action
3	Select **OA Change Process**.

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NCTracks Login

Important Announcement

NCTracks Multi-Factor Authentication (MFA) Updates Coming Soon for Individual & Business Users

In accordance with the North Carolina Identity Management (NCID) Citizen Identity Project, NCTracks is changing the User Login process and implementing Multi-Factor Authentication (MFA) updates. Please complete the following steps to update your NCID profile by **Sept. 6, 2024**, in advance of the MFA updates:

These instructions are for Individual and Business users only, not Local and State Government users.

1. Login to the MyNCID portal at https://myncidpp.nc.gov/ with your NCID Username and Password.
2. You will see the Profile Information page upon successful login.
3. Click on the **MFA** tab on your profile page.
4. Click on the **ADD ENROLLMENT** button on the bottom right.
5. A pop-up window will appear prompting you to choose an MFA method. Please note that office phone extensions are not supported.
6. Follow the onscreen prompts to add your chosen MFA method.

For detailed instructions, including images of each step, refer to the NCID User Guide for MFA.

Important Note: Providers who do not currently use MFA *will not be impacted at this time. MFA updates will be implemented through a phased approach. Until that time, your current login method will continue to work. However, you are being asked to update your profile to ensure a seamless transition to the new MFA method. You will receive further communication when your MFA is to be updated.*

If you are an Individual or Business User who currently uses MFA, these updates will impact you on Sept. 15, 2024. Once these updates are implemented you are no longer required to access and maintain MFA using https://tmfamobile.nc.gov/userportal/. All profiles, including MFA, will be managed through https://myncidpp.nc.gov/ after implementation.

If you encounter issues during login or authentication, please contact the Department of Information Technology (DIT) helpdesk at **919-754-6000 or 800-722-3946.**

For more information and training videos, visit the NCID Citizen Identity Project | NCDIT training page.

The **NCTracks Web Portal** contains information that is private and confidential.

Only users of legal age or with parental consent authorized by the North Carolina Medicaid Management Information Systems (NC MMIS) may utilize or access NCTracks Web Portal for approved purposes. Any unauthorized use, inappropriate use, or disclosure of this system or any information contained therein is prohibited and may result in revocation of access and/or legal action. If you are not an authorized individual, this private and confidential information is not intended for you. If you are not authorized to access this content, please click '**Cancel**'.

NC MMIS retains the right to monitor, record, distribute, or review any user's electronic activity, files, data, or messages. Any evidence of illegal or actionable activity may be disclosed to law enforcement officials.

By continuing, you agree that you are authorized to access confidential eligibility, enrollment and other health insurance coverage information. Please read more in our Legal and Privacy Policy pages.

All users are required to have an NCID to log in to their secure area. An NCID does not grant access to all secure areas. Access to a specified secure area is allowed per the user access rights granted by NCDHHS (State users) or the provider's Office Administrator. Recipient NCIDs does not require additional rights to access Recipient portal.

To create/update NCID record, use the appropriate link as per your NCID type.

- External Users (Provider or Recipient) click here
- State and Local Government employees (State or Fiscal Agent) click here

OA Change Process
Automated process to change OA in NCTracks

Step	Action
4	Select the **Office Administrator (OA) Change Process** button.

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Step	Action
5	User ID: Enter your **NCID username**. **Note**: In order to log in to the secure Provider Portal of NCTracks, all users must have an NCID. If you do not have an NCID, you can select the **Register now** link displayed on the login page, which will navigate you to the NCID home page.
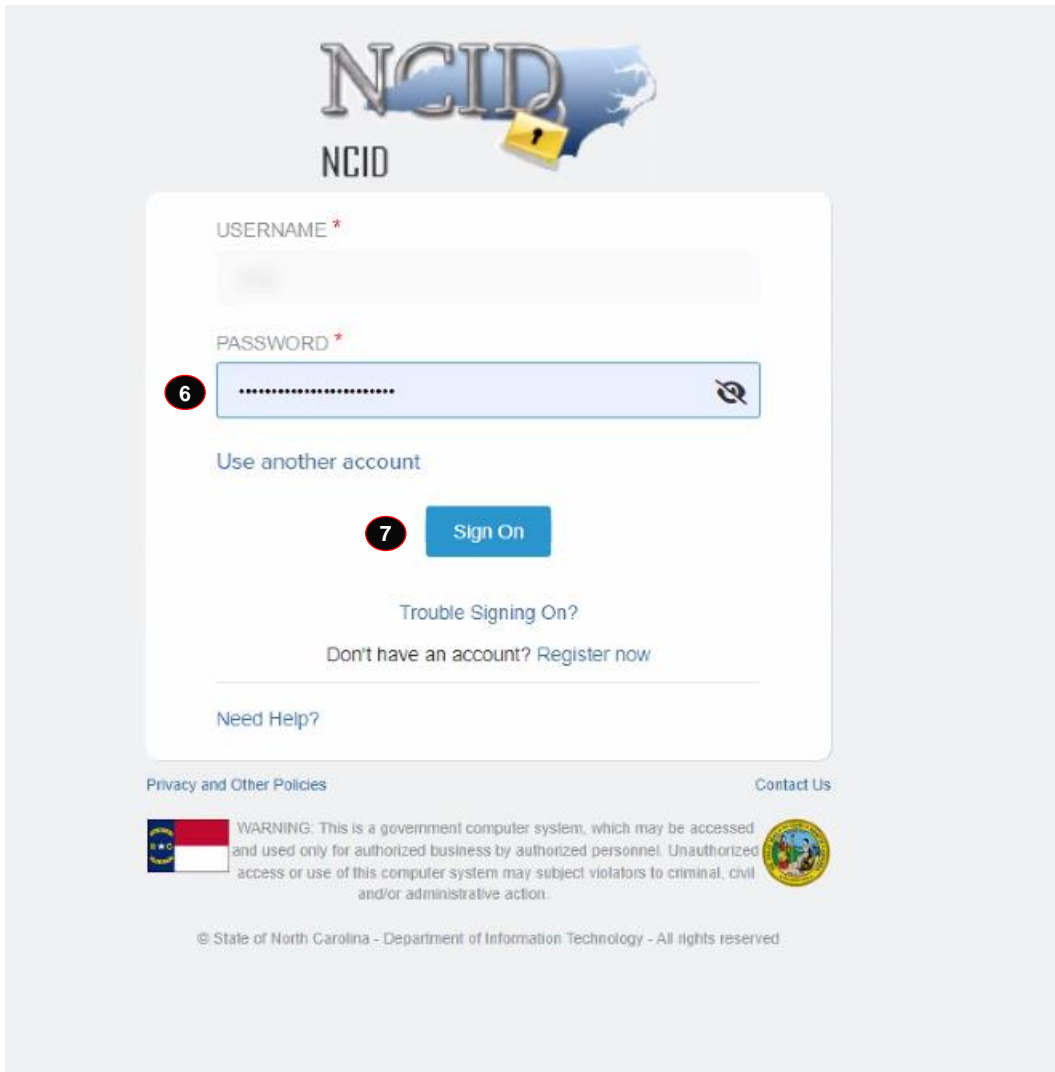
Step	Action
6	Enter the **Password** associated with the NCID.
7	Select the **Sign On** button.

NOTE: The new office administrator should login with his/her NCID and password. In order to log in to the secure Provider Portal of NCTracks, all users must have an NCID. If you do not have an NCID, you can select the **Register now** link displayed on the login page, which will navigate you to the NCID home page.

If a user is supposed to go through Multi-Factor Authentication (MFA), the State NCID system will prompt with preselected MFA preference. On successful verification of MFA, the user is navigated back to the desired secure Portal page.

Supplemental Points: Passwords are case-sensitive. After three unsuccessful attempts, the user will be locked out; however, NCTracks will provide a contact number to call for access assistance. Multi-Factor Authentication is required. Once the user has entered the User ID and password, the second level authentication is sent via the user's preferred method.

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For more information on the MFA registration process, please refer to the **NCID Citizen Identity Project** at the following site: https://it.nc.gov/support/ncid/ncid-citizen-identity-project#Tab-Training-4404

NEW OFFICE ADMINISTRATOR IS THE ACTUAL INDIVIDUAL PROVIDER

On the Change Office Administrator – Verify Authorization screen, the user must enter the Authorization Code associated with the NPI.

Step	Action
1	Enter the **Authorization Code**.
2	Enter the **NPI**.
3	Select the **Next** button.

The Authorization Code is the code that was distributed prior to the implementation of NCTracks and used as part of the Currently Enrolled Provider NCTracks Registration process. If you no longer have the code, please contact the NCTracks Contact Center at 800-688-6696.

If your NPI was registered with NCTracks after July 1, 2013, an Authorization Code has been created for you. Please contact the NCTracks Contact Center at 800-688-6696 to obtain your Authorization Code.

CHANGE OFFICE ADMINISTRATOR – OFFICE ADMINISTRATOR SCREEN

Individual Provider Information
The last name displayed is the last name on file in NCTracks for the NPI entered. If the last name or organization name displayed is incorrect, please contact the NCTracks Contact Center at 800-688-6696 or e-mail NCTracksprovider@nctracks.com.

Office Administrator (Authorized Individual)
The **Office Administrator (Authorized Individual)** section is pre-populated with the last, first, middle, and suffix name that are currently on the provider's record. The authorized user must enter the Date of Birth, SSN, Office Phone #, and Contact Email.

For the question "Are you (the new Office Administrator) a Managing Employee or the Actual Individual Provider?", select **Actual Individual Provider**.

Note: The **User ID (NCID)** field is pre-populated with the NCID of the user logged in to this application.

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Change Office Administrator - Office Administrator

Step	Action
4	Select **Actual Individual Provider**.
5	Complete all required fields: **Last Name**, **First Name**, **Date of Birth**, **Social Security Number (SSN)**, **Address**, **City**, **State**, **ZIP Code**, **Office Phone #**, **User ID (NCID)**, and **Contact Email**.
6	Select **Yes** or **No** for the question "Do you want the existing users to continue to have access to this NPI?" in the **NCTracks Users** section of the screen.
7	Select the **Next** button.

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NCTracks Users

The question "Do you want the existing users to continue to have access to this NPI?" displays allowing the authorized user to answer **Yes** or **No**.

All existing Owner and Managing Employee users (including the old OA) associated with this NPI will remain as NCTracks users for this NPI. You can terminate their access via the User Maintenance function and end-date them as Owners/Managing Employees in a Manage Change Request application once you are approved as the OA.

There may be other NCTracks users who have access to this NPI/Atypical ID. Please indicate whether you want the existing users to continue to have access to this NPI/Atypical ID. If you select **No**, any existing user (excluding Owner/Managing Employee users) who logs in to NCTracks will no longer see messages for this NPI/Atypical ID in the Message Center and will no longer see the NPI in the drop-downs for Claims, Check Eligibility, and Prior Approvals.

Note: If you select **No** and you later decide that the users do need access to your NPI, you can add them via the User Maintenance function. All Owners and Managing Employees will continue to have access to the NPI as long as they are active on the provider record.

CHANGE OFFICE ADMINISTRATOR – UPLOAD AND SUBMIT SCREEN

The authorized user must read and agree to the attestation statement.
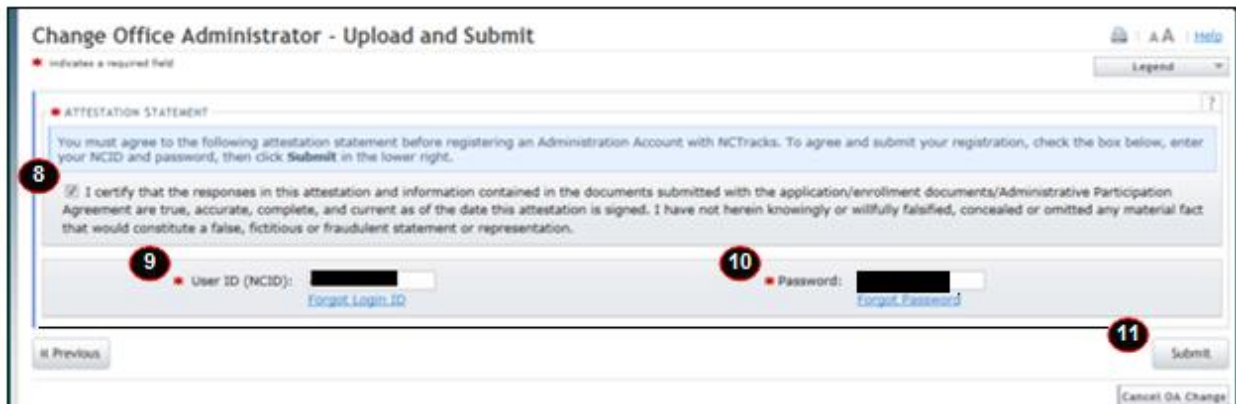
Step	Action
8	Select the **Attestation** checkbox.
9	Enter the **User ID (NCID)**.
10	Enter the **Password** associated with the NCID.
11	Select **Submit**.

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NEW OFFICE ADMINISTRATOR IS A MANAGING EMPLOYEE

The new OA should log in with his/her NCID and password on the NCTracks Login screen. On the Change Office Administrator – Verify Authorization screen, the new OA must enter the Authorization Code associated with the NPI or Atypical ID entered.

Individual Provider Information
The **Office Administrator (Authorized Individual)** section is pre-populated with the last and first name associated with the NCID used. The authorized user must ensure the name entered is the Office Administrator (Authorized Individual's) legal last and first name. The authorized user must enter the Date of Birth, SSN, Business Relationship, Relationship to Another Disclosing Person, Office Phone #, and Contact Email.

For the question "Are you (the new Office Administrator) a Managing Employee or the Actual Individual Provider?", select **Managing Employee**.

Note: The **User ID (NCID)** field is pre-populated with the NCID of the user logged in to this application.

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Step	Action
1	Select **Managing Employee**.
2	Complete all required fields: **Last Name**, **First Name**, **Date of Birth**, **Social Security Number (SSN)**, **Business Relationship**, **Relationship to Another Disclosing Person**, **Address**, **City**, **State**, **ZIP Code**, **Office Phone #**, **User ID (NCID)**, and **Contact Email**.
3	If applicable, select the checkbox for "I attest that I have entered the full legal name of the individual, and the individual does not have a middle name". **Note**: If this checkbox is not selected, ensure the **Middle Name** field has been completed.
4	Select **Yes** or **No** for the question "Do you want the existing users to continue to have access to this NPI?" in the **NCTracks Users** section of the screen.
5	Select the **Next** button.

EXCLUSION SANCTION PAGE

This page captures the exclusion sanction information.

Exclusion Sanction Questions

Select **Yes** or **No**. When **Yes** is selected for a question, the **Infraction/Conviction Dates** section is displayed.

For each question answered **Yes**, you must attach or submit a complete copy of the applicable criminal complaint or disciplinary action, Consent Order, documentation regarding recoupment/repayment settlement action, and/or final disposition clearly indicating the final resolution, and a brief statement regarding any adverse action to be submitted on letterhead which should be signed and dated. **Please note**: Submitting a written explanation in lieu of supporting documentation may result in the denial of this application.

Disclosure of adverse legal actions may not preclude participation with the NC Medicaid Program; however, full and accurate disclosure is critical to determining an applicant's eligibility for participation with the NC Medicaid Program and is required by federal law (see 42 CFR Chapter IV, part 455, Subpart B).

Infraction/Conviction Dates

You can enter an Infraction/Conviction Date in mm/dd/yyyy format or use the calendar icon to select the date by selecting the forward or back arrows to select the year, month, and day. Select the **Add** button to save the date. Up to five (5) dates can be entered.

Note: All applicable adverse legal actions must be reported regardless of whether any records were expunged or any appeals are pending.

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Step	Action
1	Enter the **Infraction/Conviction Date**.
2	Select the **Add** button.
3	Select the **Next** button.

CHANGE OFFICE ADMINISTRATOR – UPLOAD AND SUBMIT SCREEN

The authorized user must read and agree to the attestation statement.

Electronic Attachments

The **Electronic Attachments** section is displayed only if **Yes** was answered to one of the Exclusion/Sanction questions on the previous page. Browse and add applicable documents as required.

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Step	Action
4	Select the **Browse** button.
5	Select the **Add** button.
6	Select the **Attestation** checkbox.
7	Enter the **User ID (NCID)**.
8	Enter the **Password** associated with the NCID.
9	Select the **Submit** button.

NEW OFFICE ADMINISTRATOR IS AN OWNER

The new OA should log in with his/her NCID and password on the NCTracks Login screen. On the Change Office Administrator – Verify Authorization screen, the new OA must enter the Authorization Code associated with the NPI or Atypical ID entered.

Organization Provider Information
The **Office Administrator (Authorized Individual)** section is pre-populated with the last and first name associated with the NCID used. The authorized user must ensure the name entered is the Office Administrator (Authorized Individual's) legal last and first name. The authorized user must enter the Date of Birth, SSN, Gender, Address Line 1, City, State, ZIP Code, Relationship to Another Disclosing Person, Percent of Ownership/Control Interest, Office Phone #, and Contact Email.

The question "Is the Office Administrator a Managing Employee or an Owner?" is not displayed for all organization types. If the organization is state owned, federally owned, or Indian owned, there are no Owners. Thus, this question is not displayed because it is assumed the OA is a Managing Employee.

Select **Owner** if the authorized individual is an Owner; otherwise, select **Managing Employee**.

Note: The **User ID (NCID)** field is pre-populated with the NCID of the user logged in to this application.

Step	Action
1	Select **Owner**.
2	Complete all required fields: **Last Name**, **First Name**, **Date of Birth**, **Social Security Number (SSN)**, **Gender**, **Address**, **City**, **State**, **ZIP Code**, **Relationship to Another Disclosing Person**, **Percent of Ownership/Control Interest**, **Office Phone #**, **User ID (NCID)**, and **Contact Email**.
3	If applicable, select the checkbox for "I attest that I have entered the full legal name of the individual, and the individual does not have a middle name". **Note**: If this checkbox is not selected, ensure the **Middle Name** field has been completed.
4	Select **Yes** or **No** for the question "Do you want the existing users to continue to have access to this NPI?" in the **NCTracks Users** section of the screen.
5	Select the **Next** button.

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EXCLUSION SANCTION PAGE

This page captures the exclusion sanction information.

Exclusion Sanction Questions

Select **Yes** or **No**. When **Yes** is selected for a question, the **Infraction/Conviction Dates** section is displayed.

For each question answered **Yes**, you must attach or submit a complete copy of the applicable criminal complaint or disciplinary action, Consent Order, documentation regarding recoupment/repayment settlement action, and/or final disposition clearly indicating the final resolution, and a brief statement regarding any adverse action to be submitted on letterhead which should be signed and dated. **Please note**: Submitting a written explanation in lieu of supporting documentation may result in the denial of this application.

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Infraction/Conviction Dates

You can enter an Infraction/Conviction Date in mm/dd/yyyy format or use the calendar icon to select the date by selecting the forward or back arrows to select the year, month, and day. Select the **Add** button to save the date. Up to five (5) dates can be entered.

Note: All applicable adverse legal actions must be reported regardless of whether any records were expunged or any appeals are pending.

Step	Action
1	Enter the **Infraction/Conviction Date**.
2	Select the **Add** button.
3	Select the **Next** button.

CHANGE OFFICE ADMINISTRATOR – UPLOAD AND SUBMIT SCREEN

The authorized user must read and agree to the attestation statement.

Electronic Attachments

The **Electronic Attachments** section is displayed only if **Yes** was answered to one of the Exclusion/Sanction questions on the previous page. Browse and add applicable documents as required.

Step	Action
4	Select the **Browse** button.
5	Select the **Add** button.
6	Select the **Attestation** checkbox.
7	Enter the **User ID (NCID)**.
8	Enter the **Password** associated with the NCID.
9	Select the **Submit** button.

CHANGE OFFICE ADMINISTRATOR – FINAL STEPS SCREEN

The Change Office Administrator – Final Steps screen displays. From here, the user is informed of the successful submission of the Change Office Administrator application. The user can also save or print a PDF version of their online application and agreements for their records by selecting the **Office Admin Change Request PDF** hyperlink.

Note: If the new OA will be completing the Change Office Administrator application for more than one NPI/Atypical ID, the OA should complete the first application and approval process. After the first application is approved and you (the new OA) see the NPI on your Status and Management Page, future submissions with the same OA will not require credentialing.
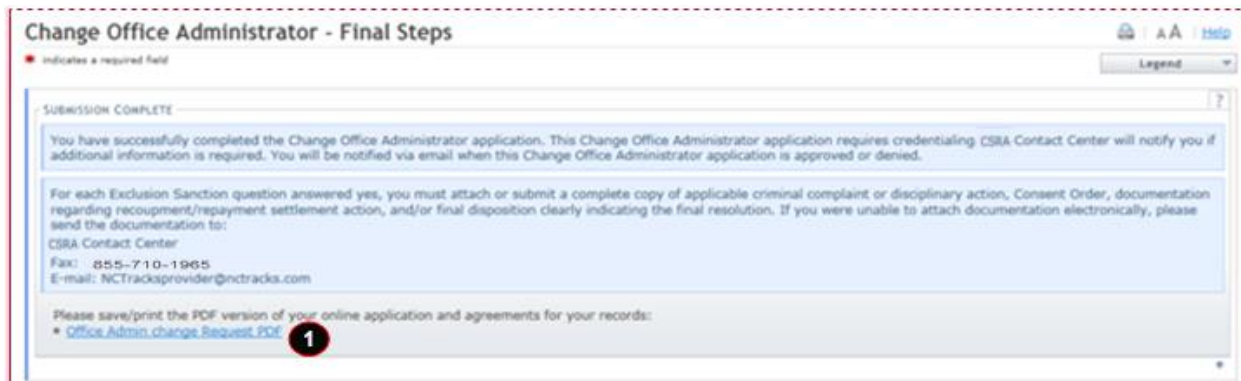
Step	Action
1	Select the **Office Admin Change Request PDF** hyperlink.

WHAT HAPPENS AFTER THE APPLICATION IS SUBMITTED?

If the new OA is the actual individual provider, no credentialing is required. The new OA becomes the OA upon submission of the application.

Credentialing is not required if the new OA is a Managing Employee or an Owner or is an active OA for another provider. The new OA becomes the OA upon submission of the application.

If the Change Office Administrator application does **NOT** require credentialing, then the following will occur within the next 24 hours:

- The new OA will receive a Change OA Approved e-mail.
- The new OA will receive a PIN e-mail if the new OA's NCID is new to NCTracks.
- The previous OA will receive a Change OA e-mail informing them that they are no longer the OA of the NPI.
- The new OA will be able to see this NPI on the Status and Management page in the Provider Portal.

If the Change Office Administrator application **DOES** require credentialing, then the application will be forwarded to the Enrollment Department for review. The authorized user will be contacted if additional information is required. The authorized user is notified via e-mail when this application is approved or denied.

If the Change Office Administrator application is approved:

- The new OA will receive a Change OA Approved e-mail.
- The new OA will receive a PIN e-mail if the new OA's NCID is new to NCTracks.
- The previous OA will receive a Change OA e-mail informing them that they are no longer the OA of the NPI.
- The new OA will be able to see this NPI on the Status and Management page in the Provider Portal.

Note: This application will not be displayed on the Status and Management page in the **Submitted Applications** section; the NPI will be displayed in the other appropriate section (**Manage Change Request**, **Re-enrollment**, **Re-verification**, or **Maintain Eligibility**) as applicable. For example, if the application is being completed as a result of a re-enrollment, then the NPI will display in the **Re-enrollment** section of the Status and Management page.

Note: The previous OA will still have access to the NPI on the Status and Management page because he/she is still an Owner/Managing Employee. The previous OA is still able to submit Manage Change Requests, Re-verifications, and Re-enrollment applications on behalf of the provider. The new OA must complete a Manage Change Request to end-date all Owner/Managing Employee relationships that are no longer associated with the NPI. If the new OA wishes to terminate a user's access to the NPI, they are able to update the user's access via the User Maintenance function.