

Delegate Management Tip-Sheet

If you are a supervisor, the Delegate Management function allows you to approve or reject new delegates, or remove existing delegates from your account.

Note: For Auditing or "reviewing" Delegates, see Delegate Audit Tip Sheet

Approving and Rejecting Delegates

If a user registers as a delegate and selects you as their supervisor, you will receive email notification that a delegate account is pending your approval.

Note: If the request is not acted upon, the system will send weekly follow-up emails advising you that action is still required.

Once you have received the email notification:

1. Log in to PMP AWAReE.
2. Click **Menu > Delegate Management**.

The Delegate Management page is displayed.

Delegate Management					
Select a delegate to review details.					
First	Last	Role	Delegate Status	Date Requested	Date Verified
Jordan	Delegate	Prescriber Delegate - Unlicensed	Pending	04/06/2018	
Adam	Delegate	Prescriber Delegate - Unlicensed	Approved	04/06/2018	04/11/2018

Note: New delegates are identified with a status of "Pending."

Click the delegate's name to display their information in the detail card at the bottom of the page.

Jordan Delegate

Role: Prescriber Delegate - Unlicensed Phone: 5028155584 Email: jrcrawford23@yahoo.com (Unverified) Address: 10401 Linn Station Rd Louisville, KY 40223 Date of Birth: 01/01/1901	Delegate (pending) Personal DEA National provider (invalid)	4 Supervisors Jordan Crawford (pending) jrcrawford@appriss.com Jordan Admin (rejected) jrcrawford+admin2@appriss.com
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4. Click **Approve** to approve the delegate;

Or

5. Click **Reject** to reject the delegate. If rejected, the delegate will be removed.

Removing/Deactivating Delegates

If you need to deactivate a delegate from your account:

1. Click **Menu > Delegate Management**.

The Delegate Management page is displayed.

Delegate Management					
Select a delegate to review details.					
First	Last	Role	Delegate Status	Date Requested	Date Verified
Jordan	Delegate	Prescriber Delegate - Unlicensed	Pending	04/06/2018	
Adam	Delegate	Prescriber Delegate - Unlicensed	Approved	04/06/2018	04/11/2018

2. Click any *Approved* delegate's name to display their information in the detail card at the bottom of the page.

3. Click **Remove**.

Upon removal, the delegate's status will be returned to "*Pending*." The delegate is not removed from your delegate list, but does not have authority to search on your behalf.

Notes:

- *If you need to add the user again at a later date, select the former delegate in Pending status, then click **Approve** to add them to your account.*
- *If you need to completely remove a delegate from your account, select the former delegate in Pending status, then click **Reject**. Rejecting a delegate will remove them from your account.*
- *It is your responsibility to regularly maintain your delegate list and remove access if it is no longer necessary.*