

# Trusted Agent Selection Guide

This guide provides an overview of the Trusted Agent attributes and general responsibilities. The purpose is to assist new clients in the selection of their organization's Trusted Agent.

## 1. Definition

The Trusted Agent role provides identity verification services through the Provider Organization on behalf of the Registration Authority (MedAllies).

## 2. Characteristics

Characteristics of the Trusted Agent include the following:

- Loyal, trustworthy, high integrity
- Employee of Provider Organization
- Legally eligible to work in the US
- Willing to participate in MedAllies training
- Understands infrastructure and operations
- Common roles of the Trusted Agent: human resources, credentialing manager, C-level executive or Operations

## 3. Responsibilities

The Trusted Agent is responsible for assuring the following individuals are LOA3 ID proofed:

- Employees (including nursing staff)
- Clinical Staff (providers)
- Affiliated Facilities (if applicable)
- Volunteer Physicians (if applicable)

The Trusted Agent is responsible to verify/ensure:

- That organization has collected applicant's name, address, date of birth, and valid government issued photo ID
- That all End User information is reported to MedAllies in a timely manner
- All records must be maintained for 7 ½ years after the End User ceases to be employed by, associated with, authorized by or affiliated with the Provider Organization
- That the organization complies with Level of Assurance 3 (LoA3) identity proofing as defined by DirectTrust policy. LoA3: High confidence in the asserted identity's validity.

## 4. Additional Information

MedAllies' Trusted Agent Training is available here for additional information and review:  
<http://medallies.com/trustedagent.html>.