How-to Guide for PASS Users

Prior Authorization Support System ('PASS') - 2018

How-to Topics

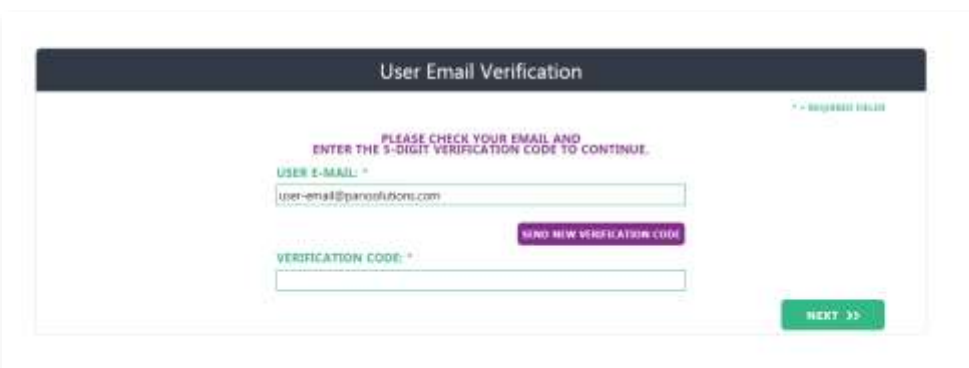
Contact Us

Please contact us at support@parxsolutions.com or at (866) 725-7279 if you need assistance with your account or with creating a PA request.

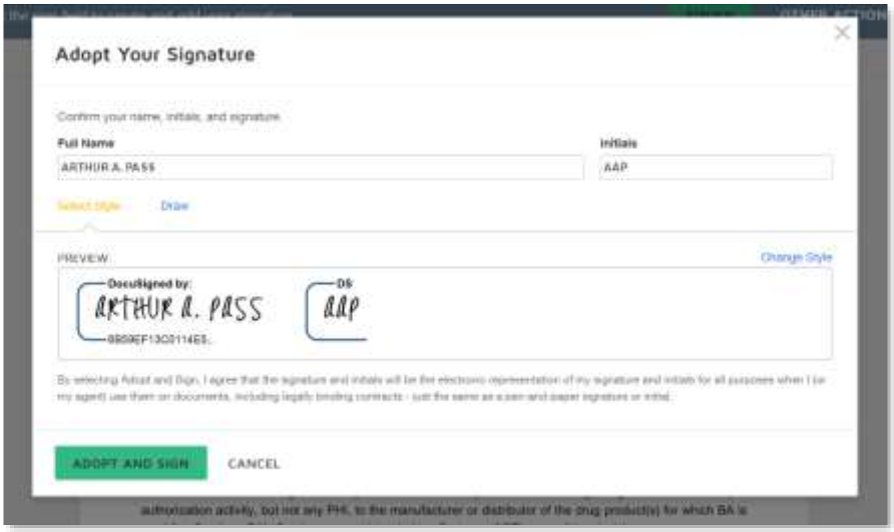
Registering with PARx PASS

1. Go to www.parxsolutions.com and click on the **Register** button in the top right corner.
2. Review the registration instructions and click **Continue to Register**.
3. Complete the **Provider Information** form. Clicking the **Check** button auto-populates the provider information and checks to make sure the NPI is not already registered with PASS. **NOTE:** You only need one provider to complete the initial account registration process – you can add more providers later under your "My Account" settings.

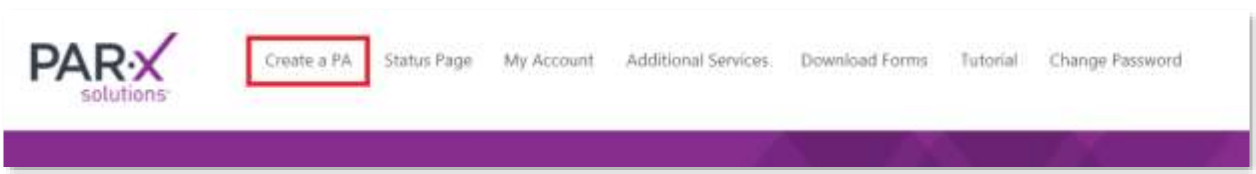
4. Complete the **Account Information** form. **NOTE:** You need only one office location to complete the initial account registration process – you can add more offices later under your "My Account" settings.
5. Complete the **User Information** form. PASS will require a unique username and a strong password. **NOTE:** The initial user is designated as the account admin user– you can add more users later under your "My Account" settings.
6. Complete the **User Email Verification**. A code will be sent to the user email. Enter the code to proceed. **NOTE:** You can update the email address and resend the code if you do not receive it at the correct email address:



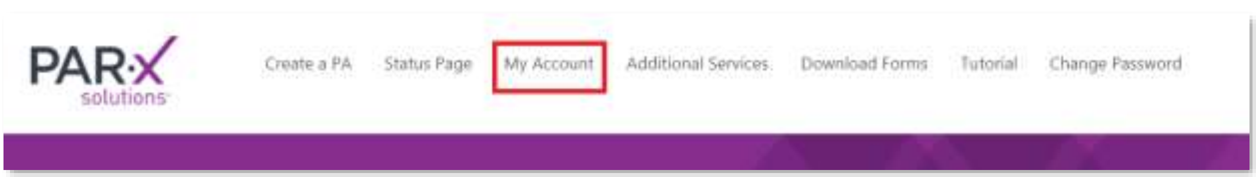
7. Select how you would like to complete the **Business Associate Agreement (BAA)** – electronically or by printing, signing, and faxing back to PARx at (866) 725-7063. **NOTE:** Faxed BAAs may take up to one business day for processing. Electronic BAAs allow you to begin submitting PAs right away.
8. If you choose to complete the BAA electronically, you will be prompted to review the BAA and complete your electronic signature:



9. Once you have signed the BAA electronically, a copy of the BAA will be emailed to you.
10. **Log in to PASS** with your username and password to begin submitting PAs by clicking on **Create a PA** in the top navigation. **NOTE**: If you faxed the BAA, you will be notified by email and phone once your account is active.



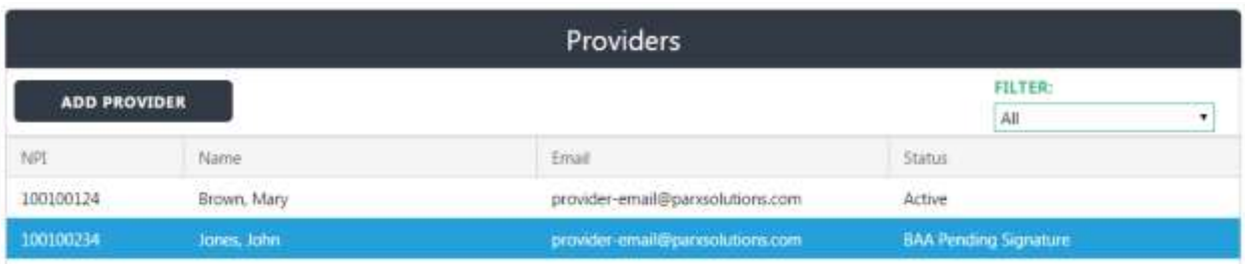
11. Click on your **My Account** settings in the top navigation to add more providers, users, locations, and patients to your account at any time:



Checking Status of a Business Associate Agreement

1. Log in to PASS and click on **My Account** in the top navigation:

2. Click on the **Provider** tab.
3. The Providers list will show you the status of the provider's BAA. **NOTE:** If PARx has received a completed BAA (either electronically or via fax), the status will show as "Active".



4. To resend or reprint a BAA, click on the name of the provider and choose how you would like to complete the BAA – electronically or by printing and faxing to PARx at (866) 725-7063.

Managing Your “My Account” Settings

As the admin user of the account, you have access to the account’s “My Account” settings and will see the link in the top-level navigation of PASS:

In “My Account”, you can:

- **Add Providers to the Practice Account**
    - Enter the provider name and NPI
    - Complete the BAA electronically to begin submitting PAs instantly for that provider
    - Or, print and fax the signed BAA to PARx (allow up to one business day of processing time before submitting a PA)
- **Add Users to the Practice Account**
    - Assign additional users to allow them the ability to submit PAs
    - Give new users access to all providers, or to specific providers only
    - Grant “admin user” access to “My Account” to all or some registered users
- **Edit User Info and User Permissions**
    - Assign admin access to another user
    - Remove ability for users to submit PA requests for given providers
    - Update user name and email address
- **Add and Edit Office Locations**
    - Add office locations
    - Assign an office as the Main location (default location)
- **Add and Edit Patient Information**
    - Add patient information to make submitting PAs even faster

*If you do not see the **My Account** link, you are not designated as an admin user of the account. The admin user of your account can provide access by following the how-to on Editing User Info and User Permissions.*

If you need assistance, contact PARx at support@parxsolutions.com or at (866) 725-7279.

Adding Providers to Your Practice Account

1. Log in to PASS and click on **My Account** at the top navigation. **NOTE:** My Account settings are only visible to an admin user.

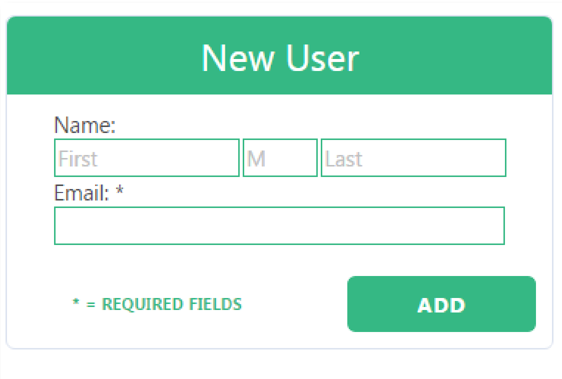
2. Under the **Providers** tab, click **Add Provider**.
3. Fill in provider details on the **New Provider** form and click **Add** (the **Check** button will confirm that the provider NPI you wish to add is not already registered in PASS):

4. Complete the **Business Associate Agreement (BAA)** as directed, either electronically or by printing and faxing to PARx.
5. Prior Authorization requests may be submitted immediately if the BAA was submitted electronically. A printed and faxed BAA may take one businees day to process. You can view the status of the BAA in the “Providers” tab.
6. Repeat the steps above to add additional providers.
7. You will then be able to choose from a drop-down of active providers when creating a PA request.

Adding Users to Your Practice Account

1. Log in to PASS and click on **My Account** at the top navigation. **NOTE:** My Account settings are only visible by an admin user.

2. Under the **Users** tab, click **Add Users**.
3. Fill in the **New User** form and click **Add:**



4. An email will be sent inviting the new user to join the account. The email will contain a link instructing the user to create a login and password to the account. The admin user will be notified via email once the new user has created the login.
   NOTE: The new user will then be able to log into the account and submit PAs for all providers. You can adjust their permissions to be able to submit PAs on a per-provider basis, or give them admin controls, in **My Account > Edit User**.

Editing User Info and User Permissions

1. Log in to PASS and click on **My Account** at the top navigation. **NOTE:** My Account settings are only visible by an admin user.

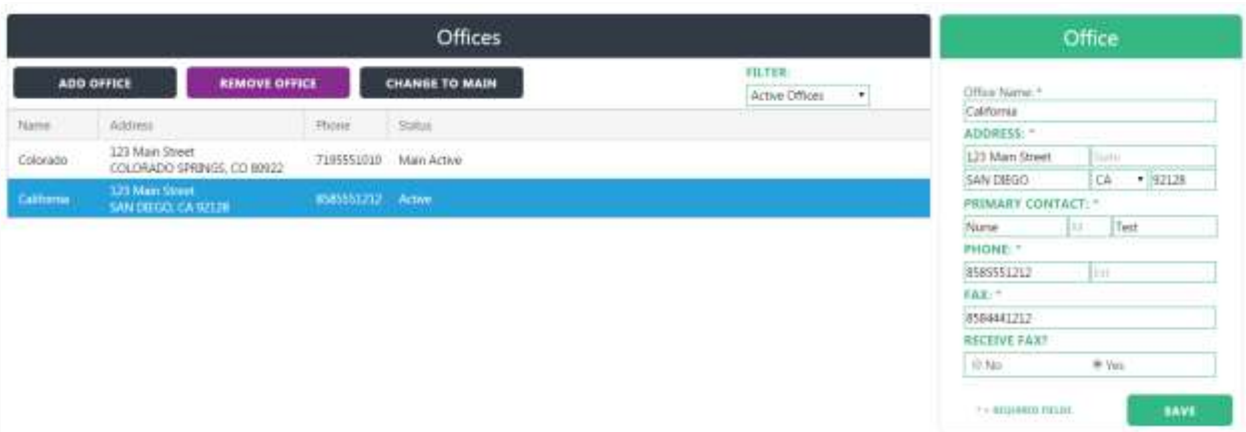
2. Click on the **Users** tab.
3. Highlight the name of the user you wish to edit.
4. The User edit form will appear:

5. Update the user's first and last name, or email address, if needed. **NOTE:** Usernames are unique and cannot be changed.
6. To remove the user's ability to submit a PA for a given provider, uncheck the provider name in the "Providers Access" window. **NOTE:** Admins by default have access to all providers. To adjust Provider Access, the user <u>cannot be an admin</u>. Uncheck admin, then uncheck Providers.
7. To make the user an admin user on the practice account (ability to access My Account settings), check the "Admin" box in the upper right corner.

Adding and Editing Office Locations

1. Log in to PASS and click on **My Account** at the top navigation. **NOTE:** My Account settings are only visible by an admin user.

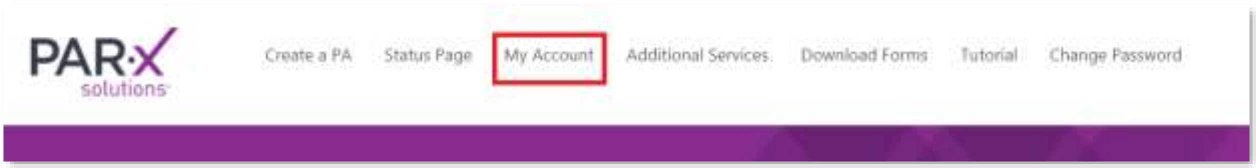
2. Click on the **Offices** tab.
3. To add an office, click on the **Add Office** button. A form will appear for you to enter in the new office information.
4. To edit an existing office, highlight the office location you wish to edit. An edit form will appear to the right of the page. **NOTE:** Use the **Change to Main** button to designate an office as the default location when you create a new PA request.



Adding and Editing Patient Information

NOTE: PASS saves patient information with each PA request submitted. However, if you wish to edit patient information for use on future PAs, or add patients in advance of submitting PA requests, follow the steps below.

1. Log in to PASS and click on **My Account** at the top navigation. **NOTE:** My Account settings are only visible by an admin user.

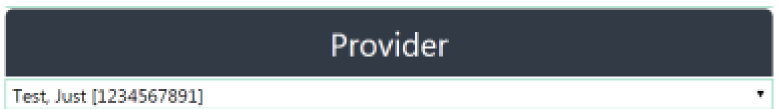


2. Click on the **Patients** tab.
3. To add a new patient, click the **Add Patient** button. A form will appear for you to enter in the new patient information. **NOTE:** If there is already a patient with the same name, address, date of birth, and prescription plan member ID listed, PASS will prompt you to edit the existing patient. It will create a new record if any of these pieces of data are different, or if they are all the same and only the plan member ID is different.
4. To edit an existing patient, highlight the line of the patient you wish to edit. An edit form will appear to the right for you to update the patient information:

Creating a Prior Authorization Request

1. Log in to PASS and click on **Create a PA** in the top level navigation:

2. Select the **Location** and **Provider** for which you want to process the PA from the drop down menus:



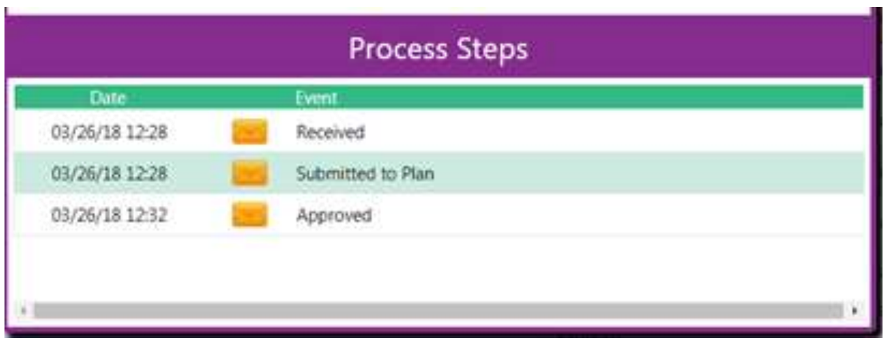
3. Select the **Desired Medication** and complete the duration, strength, and formulation fields.
4. Complete the **Patient Information** form. If you have processed a PA for a patient before, start typing the last name in the search box to retrieve saved information. **NOTE:** Be sure to include accurate prescription plan information.

5. Include **Pharmacy Information**, if known, and any **Medications and Allergies.**
6. Complete the **Diagnosis Information** form. **NOTE:** It is important to include **Drugs Tried/Failed**, as many plans require documented trial of one or more formulary alternatives.
7. Complete the **Additional Information** form, as needed, and add any **Additional Comments**.
8. **Review Request** and click **Submit**.
9. Your PA request will then be processed by PARx specialists.

Checking Status of a Prior Authorization

1. Login to PASS and click on the  icon.

2. A **Process Steps** window will appear with the status of that PA request:

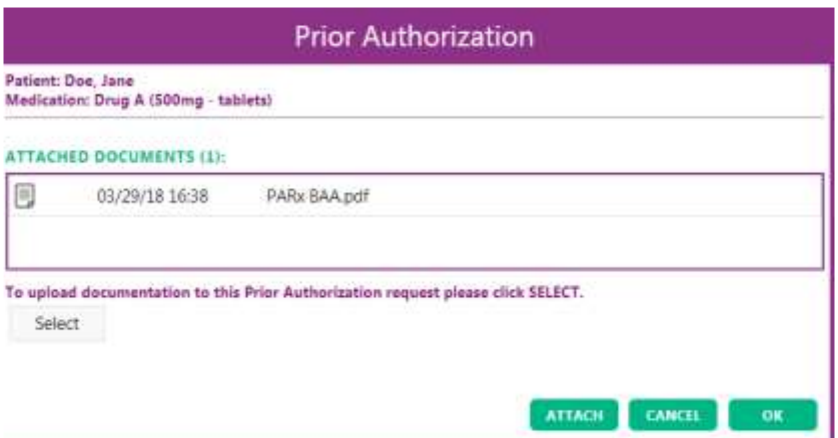


3. Use the filters in the Prior Authorization Requests list to sort by date, provider, or status.

Uploading Attachments (Chart Notes) to a PA

1. Login to PASS and click on the  icon.

2. An attachment window will appear:



3. Click **Select** to find the PDF(s) you would like to attach (PDFs only). The window will also show you any previously attached documents to the PA. Click **ATTACH.**
4. When complete, click the **OK** button to attach and close the window.
5. PARx will then be notified of your attachment(s).