



How-to Guide for PASS Users

Prior Authorization Support System ('PASS') - 2018

How-to Topics

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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

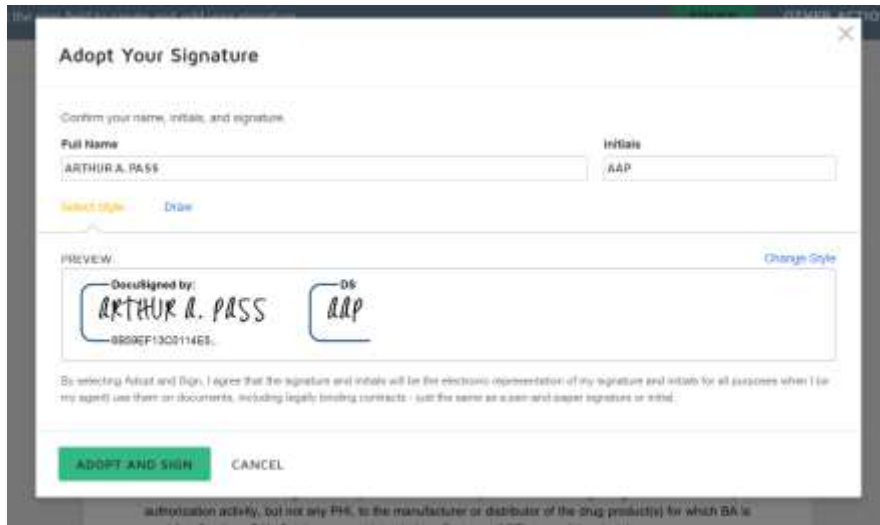
1. Go to www.parxsolutions.com and click on the **Register** button in the top right corner.
2. Review the registration instructions and click **Continue to Register**.
3. Complete the **Provider Information** form. Clicking the **Check** button auto-populates the provider information and checks to make 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.

The screenshot shows the 'Provider Information' form. At the top, it says 'Provider Information' and 'REQUIRED FIELDS'. Below that, it instructs the user: 'USE THE CHECK BUTTON BELOW TO VERIFY THAT THE NPI YOU WISH TO ADD IS NOT ALREADY REGISTERED IN PASS.' The form includes fields for NPI (with a 'CHECK' button), PROVIDER NAME (split into First, MI, and Last), EMAIL, DEGREE, SPECIALTY (a dropdown menu), and TAX ID. At the bottom, there are 'BACK' and 'NEXT' buttons, and a note: 'YOU CAN ADD MORE PROVIDERS LATER UNDER MY ACCOUNT.'

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:

The screenshot shows the 'User Email Verification' form. It says 'REQUIRED FIELDS' and 'PLEASE CHECK YOUR EMAIL AND ENTER THE 5-DIGIT VERIFICATION CODE TO CONTINUE.' The form includes a 'USER E-MAIL' field (pre-filled with 'user-email@parxsolutions.com') and a 'VERIFICATION CODE' field. There is a 'SEND NEW VERIFICATION CODE' button and a 'NEXT' button at the bottom right.

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:

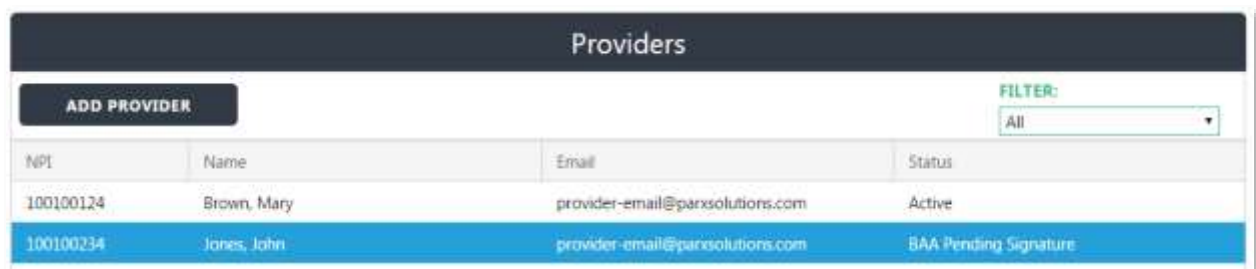


Checking Status of a Business Associate Agreement

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".



The screenshot shows the 'Providers' page. At the top, there is a dark header with the word 'Providers' in white. Below the header is a white area with an 'ADD PROVIDER' button on the left and a 'FILTER:' dropdown menu on the right, currently set to 'All'. Below this is a table with the following data:

NPI	Name	Email	Status
100100124	Brown, Mary	provider-email@parxsolutions.com	Active
100100234	Jones, John	provider-email@parxsolutions.com	BAA Pending Signature

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):

A screenshot of the 'New Provider' form. The form has a green header with the text 'New Provider'. Below the header are several input fields: 'NPI: *' with a text box and a green 'CHECK' button; 'PROVIDER NAME: *' with three text boxes labeled 'First', 'M', and 'Last'; 'EMAIL: *' with a text box; 'DEGREE: *' with a text box; 'SPECIALTY: *' with a dropdown menu showing '[SELECT]'; and 'TAX ID:' with a text box. At the bottom left, there is a note '* = REQUIRED FIELDS'. At the bottom right, there is a green 'ADD' button.

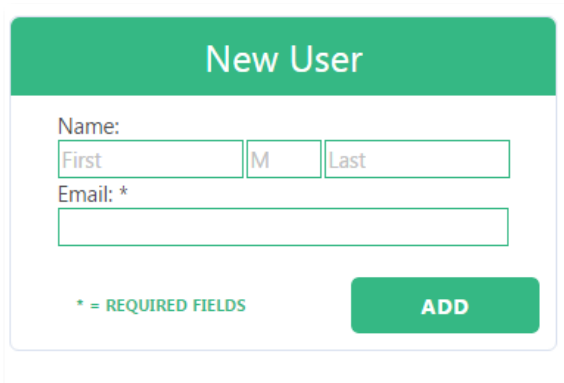
4. Complete the **Business Associate Agreement (BAA)** as directed, either electronically or by printing and faxing to PARx.
5. Prior Authorization requests may be submitted immediately if the BAA was submitted electronically. A printed and faxed BAA may take one business day to process. You can view 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**:

A screenshot of the 'New User' form. The form has a green header with the text 'New User'. Below the header are three input fields for 'Name': 'First', 'M', and 'Last'. Below these is an 'Email: *' field. At the bottom left, there is a legend: '* = REQUIRED FIELDS'. At the bottom right, there is a green button with the text '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:

A screenshot of the 'User' edit form. The form has a green header with the word 'User'. Below the header, there is a checkbox labeled 'Admin' which is checked and highlighted with a red box. The form contains several input fields: 'Username: *' with the value 'Jan05', 'Name:' with 'John' in the first field, 'M' in the middle, and 'Smith' in the last; and 'Email: *' with the value 'user-email@parxsolutions.com'. Below these is a section titled 'Providers Access:' which contains two checked items: 'Brown, Mary [100100124]' and 'Jones, John [100100101]'. This section is also highlighted with a red box. At the bottom left, there is a note '* = REQUIRED FIELDS' and at the bottom right, a green 'SAVE' button.

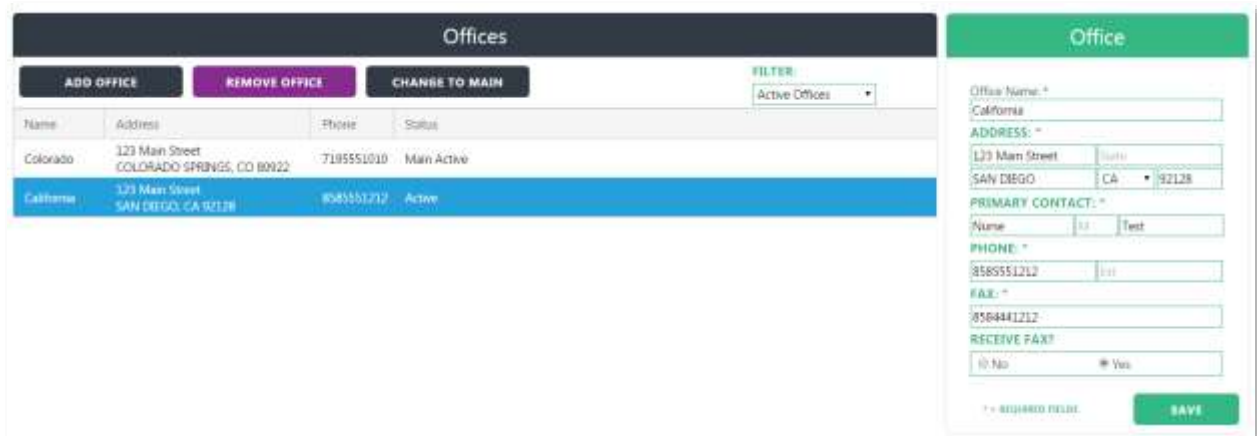
5. Update the user's first and last name, or email address, if needed. **NOTE:** Usernames are unique and cannot be changed.
6. To remove the user's ability to submit a PA for a given provider, uncheck the provider name in the "Providers Access" window. **NOTE:** Admins by default have access to all providers. To adjust Provider Access, the user cannot be an admin. 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:

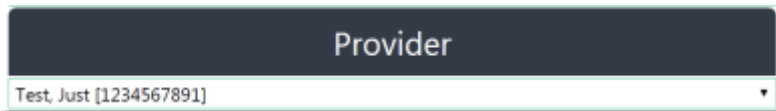


Creating a Prior Authorization Request

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.

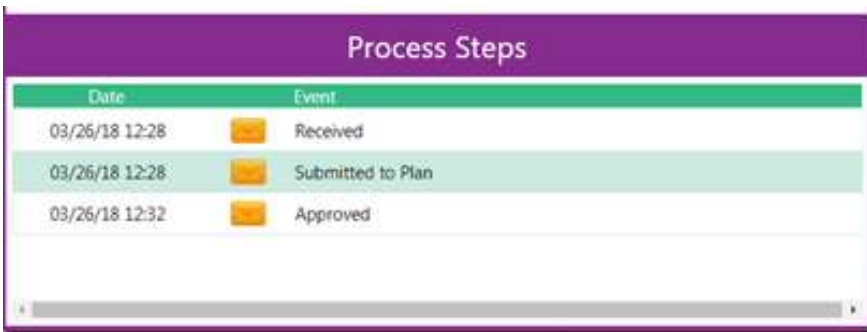
Checking Status of a Prior Authorization

1. Login to PASS and click on the  icon.



Req #	Office	Provider	Patient	Prescription Plan	Medication	PA Status	Creation Date
PA 787244	Colorado	Test, Just A	Doe, Jane	Medco	Drug C (Drug - Capsules)	Pending with Plan	03/29/18 16:38
PA 787243	Colorado	Test, Just A	Doe, Jane	Medco	Drug A (500mg - Tablets)	Received	03/29/18 16:38


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



Date	Event
03/26/18 12:28	Received
03/26/18 12:28	Submitted to Plan
03/26/18 12:32	Approved

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.



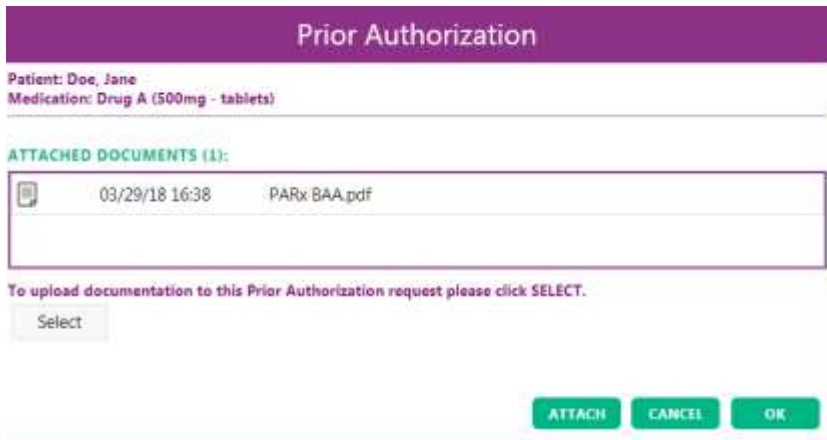
ZZ - Just Test | 13655 Welcome dtart | Log Out

Prior Authorization Requests

Quick Select: From Date: 12/28/2018 To Date: 1/29/2018 Provider: All Providers Status: All Status REFRESH

Req #	Office	Provider	Polym	Prescription Plan	Medication	PA Status	Creation Date	
PA	787244	Colorado	Test, Just A	Doe, Jane	Medco	Drug C (5mg - Capsules)	Pending with Plan	03/29/18 16:38
PA	787243	Colorado	Test, Just A	Doe, Jane	Medco	Drug A (500mg - tablets)	Received	03/29/18 16:38


2. An attachment window will appear:



Prior Authorization

Patient: Doe, Jane
Medication: Drug A (500mg - tablets)

ATTACHED DOCUMENTS (1):

	03/29/18 16:38	PARx BAA.pdf
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To upload documentation to this Prior Authorization request please click SELECT.

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).