



How-to Guide for PASS Users

Prior Authorization Support System ('PASS')

How-to Topics

How-to Topics	1
Contact Us.....	1
Registering with PARx PASS.....	2
Checking Status of a Business Associate Agreement	4
Managing Your “My Account” Settings	5
Adding Providers to Your Practice Account.....	6
Adding Users to Your Practice Account.....	7
Editing User Info and User Permissions	8
Adding and Editing Office Locations	9
Adding and Editing Patient Information	10
Creating a Prior Authorization (PA) Request.....	11
Creating a Request from a Faxed Invitation	12
Creating a Request via the Invitations Status Page	13
Checking Status of a Prior Authorization	14
Sending a PA Support Message.....	15
Uploading Attachments (Chart Notes) to a PA	16
Filter Requests by Patient.....	17

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.

You may also send a support message via PASS (see page 15).

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 this, there is a green instruction: 'USE THE CHECK BUTTON BELOW TO VERIFY THAT THE NPI YOU WISH TO ADD IS NOT ALREADY REGISTERED IN PASS.' The form fields include: NPI: * (with a 'CHECK' button), PROVIDER NAME: * (with sub-fields for First, M, and Last), EMAIL: *, DEGREE: *, SPECIALTY: * (a dropdown menu with '[SELECT]' selected), and TAX ID: *. At the bottom, there are navigation buttons: '<< BACK' (purple), 'YOU CAN ADD MORE PROVIDERS LATER UNDER MY ACCOUNT' (purple text), and 'NEXT >>' (green).

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. At the top, it says 'User Email Verification' and '* = REQUIRED FIELDS'. Below this, there is a green instruction: 'PLEASE CHECK YOUR EMAIL AND ENTER THE 5-DIGIT VERIFICATION CODE TO CONTINUE.' The form fields include: USER E-MAIL: * (with the example 'user-email@parxsolutions.com') and VERIFICATION CODE: *. There is a purple button labeled 'SEND NEW VERIFICATION CODE' and a green '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:

Adopt Your Signature

Confirm your name, initials, and signature.

Full Name: ARTHUR A. PASS Initials: AAP

Select Style Draw

PREVIEW Change Style

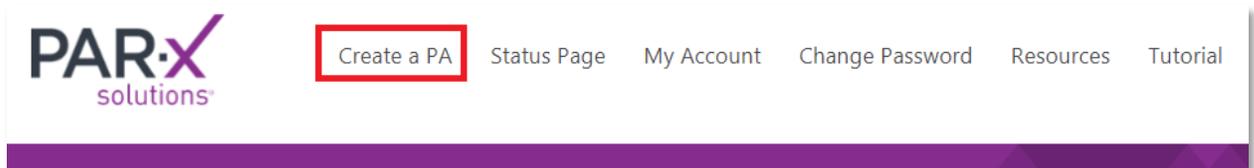
DocuSigned by: ARTHUR A. PASS DS: AAP

0B59EF13C0114E5...

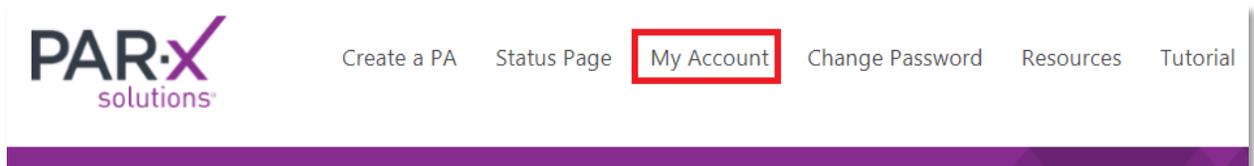
By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

ADOPT AND SIGN CANCEL

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.

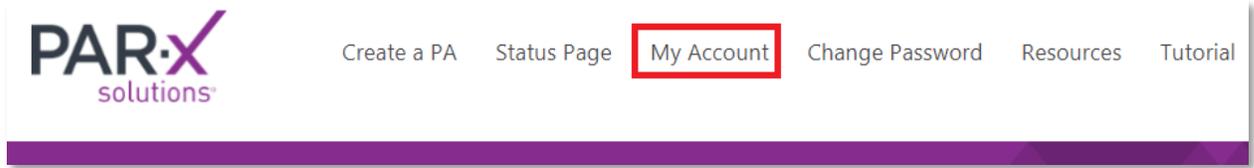


11. Click on your **My Account** settings in the top navigation to add more providers, users, locations, and patients to your account at any time:



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".

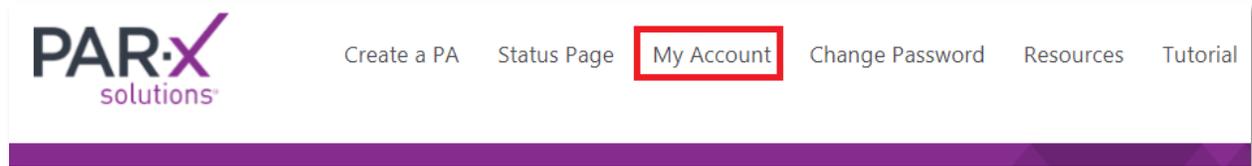
The screenshot shows a table titled 'Providers'. At the top left of the table area is a dark button labeled 'ADD PROVIDER'. At the top right is a 'FILTER:' dropdown menu currently set to 'All'. The table has four columns: 'NPI', 'Name', 'Email', and 'Status'. There are two rows of data. The first row is highlighted in light blue and shows NPI 100100124, Name Brown, Mary, Email provider-email@parxsolutions.com, and Status Active. The second row is highlighted in a darker blue and shows NPI 100100234, Name Jones, John, Email provider-email@parxsolutions.com, and Status BAA Pending Signature.

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:

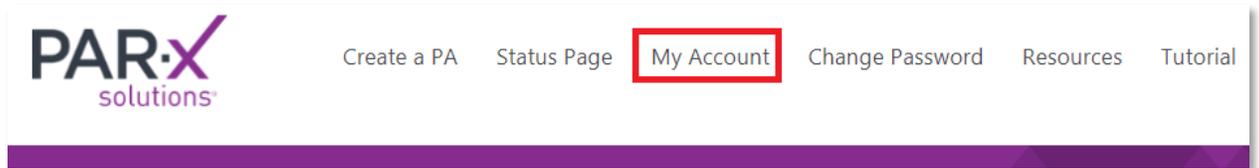
- **Add Providers to the Practice Account**
 - Enter the provider name and NPI
 - Complete the BAA electronically to begin submitting PAs instantly for that provider
 - Or, print and fax the signed BAA to PARx (allow up to one business day of processing time before submitting a PA)
- **Add Users to the 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 username 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](#).*

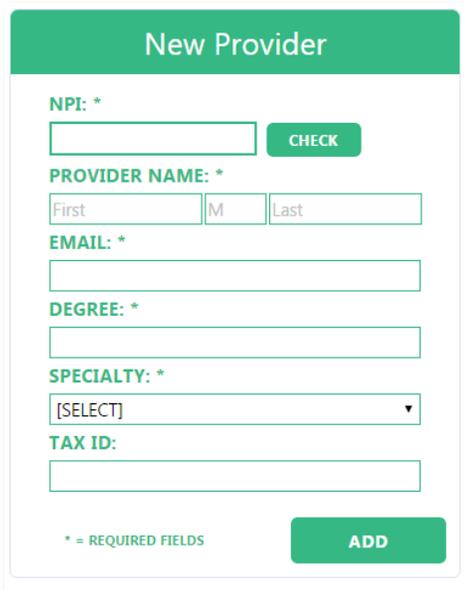
If you need assistance, contact PARx at support@parxsolutions.com or at (866) 725-7279.

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.



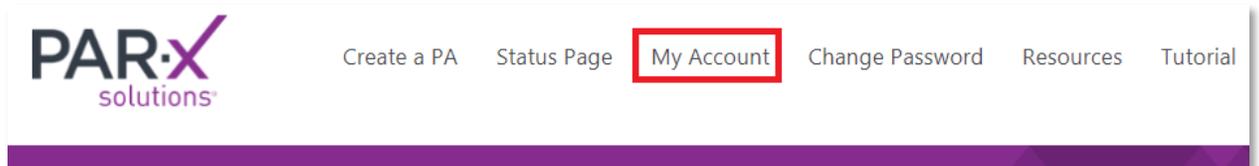
2. Under the **Providers** tab, click **Add Provider**.
3. Fill in provider details on the **New Provider** form and click **Add** (the **Check** button will confirm that the provider NPI you wish to add is not already registered in PASS):

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

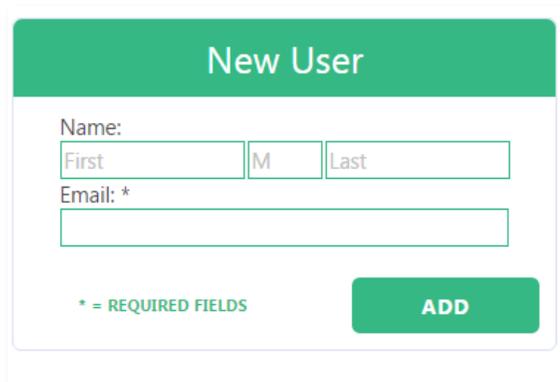
4. Complete the **Business Associate Agreement (BAA)** as directed, either electronically or by printing and faxing to PARx.
5. Prior Authorization requests may be submitted immediately if the BAA was submitted electronically. A printed and faxed BAA may take one business day to process. You can view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



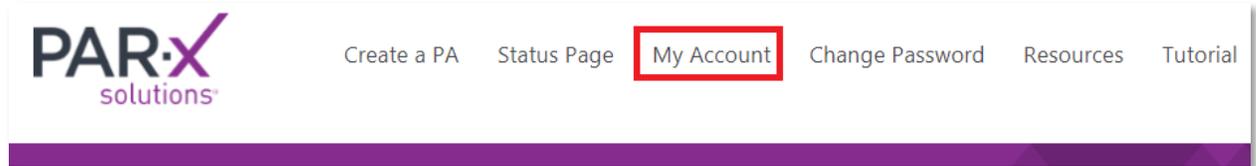
2. Under the **Users** tab, click **Add Users**.
3. Fill in the **New User** form and click **Add**:

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 a single input field for 'Email: *'. At the bottom left, there is a legend '* = REQUIRED FIELDS'. At the bottom right, there is a green button labeled 'ADD'.

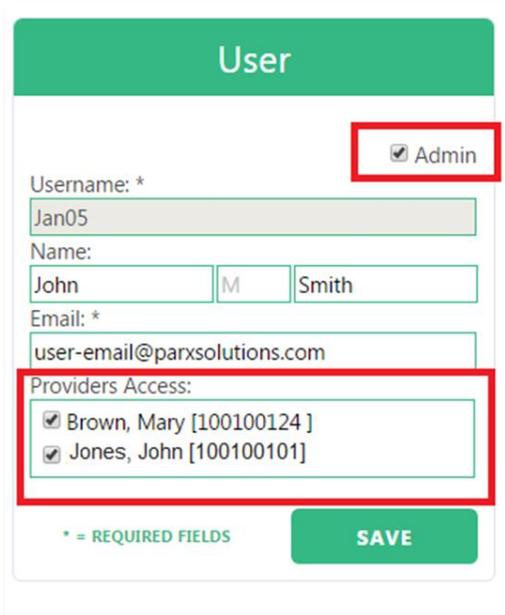
4. An email will be sent inviting the new user to join the account. The email will contain a link instructing the user to create a login and password to the account. The admin user will be notified via email once the new user has created the login.
NOTE: The new user will then be able to log into the 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.



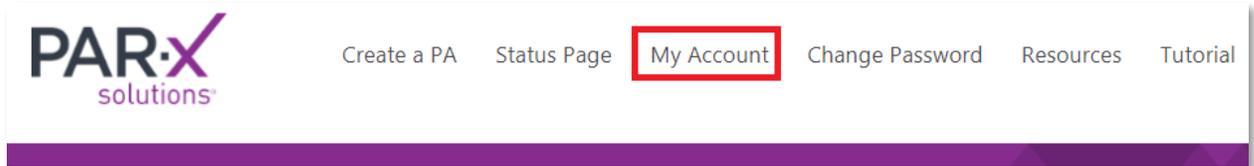
2. Click on the **Users** tab.
3. Highlight the name of the user you wish to edit.
4. The User edit form will appear:

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' and 'Smith' in separate boxes and 'M' in a middle box, and 'Email: *' with the value 'user-email@parxsolutions.com'. Below these is a section titled 'Providers Access:' which is also highlighted with a red box. It contains two checked checkboxes: 'Brown, Mary [100100124]' and 'Jones, John [100100101]'. At the bottom left, there is a legend '* = REQUIRED FIELDS' and 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.

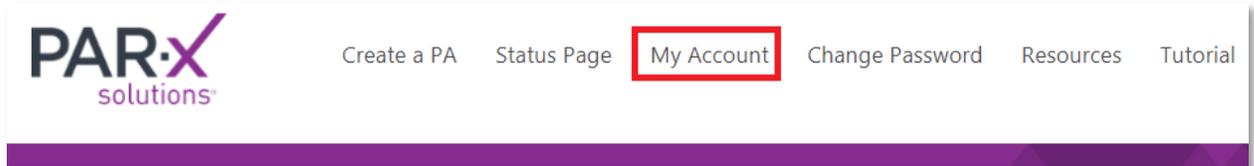
Offices							
ADD OFFICE		REMOVE OFFICE		CHANGE TO MAIN		FILTER:	
Name	Address	Phone	Status			Active Offices	
Colorado	123 Main Street COLORADO SPRINGS, CO 80922	7195551010	Main Active				
California	123 Main Street SAN DIEGO, CA 92128	8585551212	Active				

Office	
Office Name: *	California
ADDRESS: *	123 Main Street Suite SAN DIEGO CA 92128
PRIMARY CONTACT: *	Nurse M Test
PHONE: *	8585551212 Ext
FAX: *	8584441212
RECEIVE FAX?	<input type="radio"/> No <input checked="" type="radio"/> Yes
* = REQUIRED FIELDS	
SAVE	

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:

The screenshot displays the 'Patients' management interface. On the left is a table with columns for Name, Address, Gender, DOB, Phone, and Plan. The first row is highlighted in blue. To the right of the table is a 'Patient' edit form with fields for Patient Name (First, M, Last), Address (Street, Suite, City, State, Zip), Phone (Main, Ext), Gender, Date of Birth, Prescription Plan Name, and Prescription Plan Member ID. A 'SAVE' button is at the bottom right of the form.

Name	Address	Gender	DOB	Phone	Plan
Last, First	123 Street BRAINTREE, MA 02184	F	11/11/11	5555555555	12345 Payme
One, Patient	123 Road PALMYRA, NJ 08065	F	11/11/23	5555555555	12345 Payme
Zero, Patient	123 Street Road BOSTON, MA 02125	F	11/11/11	5555555555	12345 Payme
Zero, Patient	123 Street Road BOSTON, MA 02125	F	11/11/11	5555555555	54321 Plan

Patient

PATIENT NAME: *
First [] M [] Last []

ADDRESS
123 Street [] Suite []
BRAINTREE [] MA [] 02184 []

PHONE
5555555555 [] Ext []

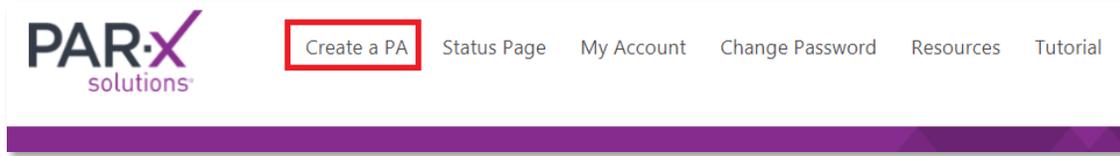
GENDER: [] DATE OF BIRTH: []
Female [] 11/11/1911 []

Prescription Plan
SPECIFY PRESCRIPTION PLAN NAME: *
Payme []
PRESCRIPTION PLAN MEMBER ID: *
12345 []

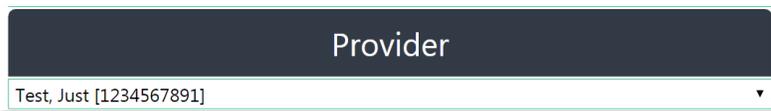
* = REQUIRED FIELDS SAVE

Creating a Prior Authorization (PA) 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.



Search

PATIENT LAST NAME:
Test, Test (DOB:01/01/1982)

Patient Information

NEW SAVE

PATIENT NAME: *
Test M Test

ADDRESS: *
123 Main St Suite
DUBLIN CA 94568

PHONE: *
1231231234 Ext

GENDER: * DATE OF BIRTH: *
Female 1/1/1982

Prescription Plan

To avoid processing delays, please provide the **specific plan name if your patient has Medicare for prescription drug coverage.**
SPECIFY PRESCRIPTION PLAN NAME: *
Medco

PRESCRIPTION PLAN MEMBER ID: *
123456789

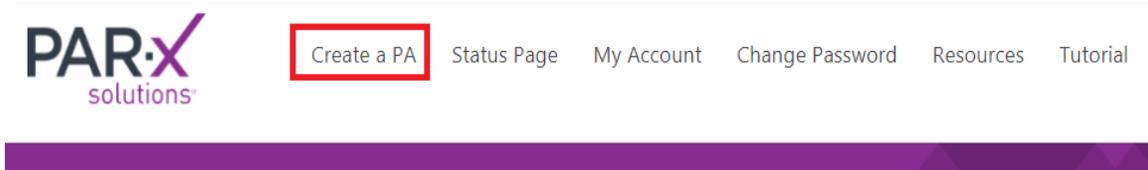
<< BACK NEXT >>

5. Include **Pharmacy Information**, if known.
6. Complete the **Diagnosis Information** form. **NOTE:** It is important to include **Alternative Therapies Tried**, 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.

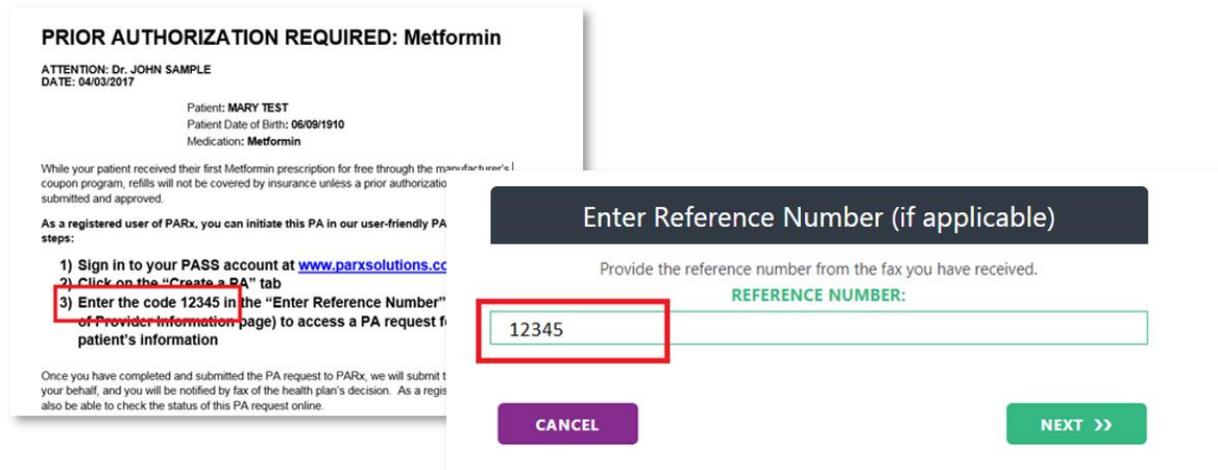
Creating a Request from a Faxed Invitation

PARx may be notified by partners that an authorization is required and will fax you an invitation to complete a pre-populated request for a given patient. Follow the steps to complete the request.

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



2. Enter the **Reference Number** from the invitation letter you have received



PRIOR AUTHORIZATION REQUIRED: Metformin
ATTENTION: Dr. JOHN SAMPLE
DATE: 04/03/2017

Patient: **MARY TEST**
Patient Date of Birth: **06/09/1910**
Medication: **Metformin**

While your patient received their first Metformin prescription for free through the manufacturer's coupon program, refills will not be covered by insurance unless a prior authorization is submitted and approved.

As a registered user of PARx, you can initiate this PA in our user-friendly PA steps:

- 1) Sign in to your PASS account at www.parxsolutions.cc
- 2) Click on the "Create a PA" tab
- 3) Enter the code 12345 in the "Enter Reference Number" of Provider Information page to access a PA request for patient's information

Once you have completed and submitted the PA request to PARx, we will submit it on your behalf, and you will be notified by fax of the health plan's decision. As a registered user, you will also be able to check the status of this PA request online.

Enter Reference Number (if applicable)
Provide the reference number from the fax you have received.

REFERENCE NUMBER:

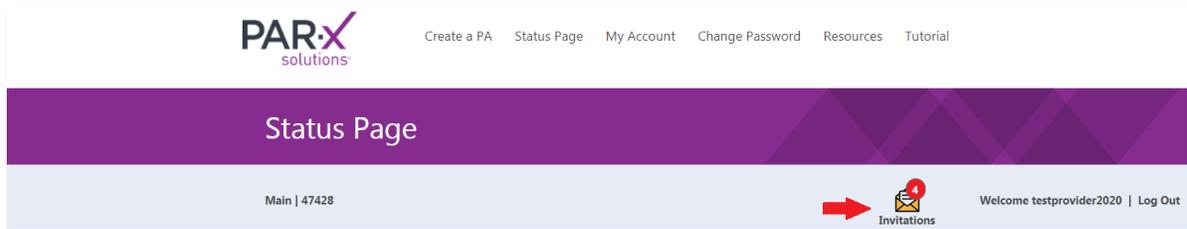
CANCEL **NEXT >>**

3. Click **NEXT** – the **Location, Provider, Patient Information**, and the **Desired Medication** name will be pre-populated. You may edit the information if needed.
4. Include **Pharmacy Information**, if known.
5. Complete the **Diagnosis Information** form. **NOTE:** It is important to include **Alternative Therapies Tried**, as many plans require documented trial of one or more formulary alternatives.
6. Complete the **Additional Information** form, as needed, and add any **Additional Comments**.
7. **Review Request** and click **Submit**.
8. Your PA request will then be processed by PARx specialists.

Creating a Request via the Invitations Status Page

PARx may be notified by partners that an authorization is required and will upload a partially completed request for a given patient on the Invitations status page. Follow the steps to complete the request.

1. Log in to PASS and click on the **Invitations** filter icon located in margin of Requests table:



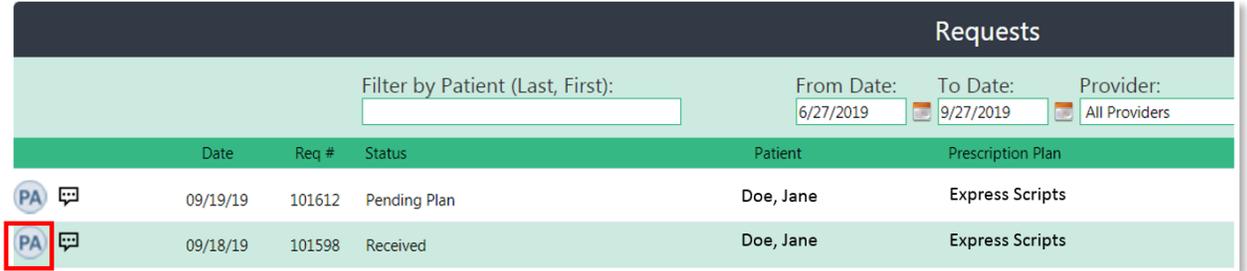
2. Click on the pencil icon next to the request that you would like to complete:

	Date	Req #	Status
   	02/28/20	102024	Pending Invitation ⚠ Action Required
   	02/28/20	102014	Pending Invitation ⚠ Action Required

3. The **Location, Provider, Patient Information**, and the **Desired Medication** name will be pre-populated. You may edit the information if needed.
4. Include **Pharmacy Information**, if known.
5. Complete the **Diagnosis Information** form. **NOTE:** It is important to include **Alternative Therapies Tried**, as many plans require documented trial of one or more formulary alternatives.
6. Complete the **Additional Information** form, as needed, and add any **Additional Comments**.
7. **Review Request** and click **Submit**.
8. Your PA request will then be processed by PARx specialists.

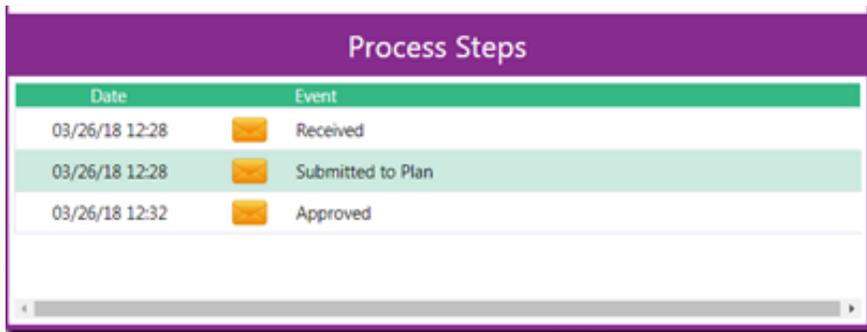
Checking Status of a Prior Authorization

1. Login to PASS and click on the  icon.



Requests					
Filter by Patient (Last, First):			From Date:	To Date:	Provider:
			6/27/2019	9/27/2019	All Providers
Date	Req #	Status	Patient	Prescription Plan	
 09/19/19	101612	Pending Plan	Doe, Jane	Express Scripts	
 09/18/19	101598	Received	Doe, Jane	Express Scripts	

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.

Sending a PA Support Message

1. From the Status Page, click the message icon next to the PA for which you wish to contact PARx support:



2. Fill in your **Name** (required) and **Message** and click **SEND**, or **SEND & CLOSE** if you wish to exit the message window:

A screenshot of a 'PA Messaging' window. The title bar says 'PA Messaging'. Below it, patient information is displayed: 'Patient: Doe, John' and 'Medication: Metformin (500 mg - Tablets)'. The main area is titled 'New Message' and contains two text input fields: 'YOUR NAME:' and 'MESSAGE:'. Below the 'MESSAGE:' field is a 'SEND' button. At the bottom of the window are 'CANCEL' and 'SEND & CLOSE' buttons.

3. PARx support will respond to your message – a message icon  will appear on the Status Page with the number of messages received. Click on the icon to view the response messages.
4. Click **Messages Acknowledged** to close out a conversation.

You may also contact us at support@parxsolutions.com or at (866) 725-7279 if you need assistance.

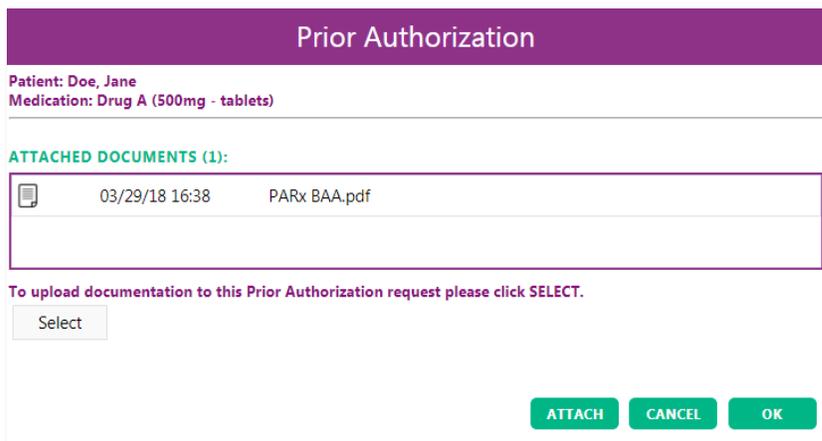
Uploading Attachments (Chart Notes) to a PA

1. Login to PASS and click on the  icon:



Requests					
Filter by Patient (Last, First):		From Date:	To Date:	Provider:	
<input type="text"/>		6/27/2019	9/27/2019	All Providers	
Date	Req #	Status	Patient	Prescription Plan	
 09/19/19	101612	Pending Plan	Doe, Jane	Express Scripts	
 09/18/19	101598	Received	Doe, Jane	Express Scripts	

An attachment window will appear:



Prior Authorization

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

ATTACHED DOCUMENTS (1):

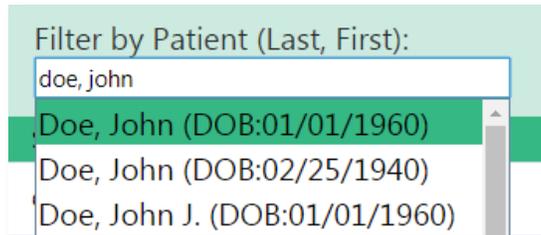
	03/29/18 16:38	PARx BAA.pdf
--	----------------	--------------

To upload documentation to this Prior Authorization request please click **SELECT**.

2. 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**.
3. When complete, click the **OK** button to attach and close the window.
4. PARx will then be notified of your attachment(s).

Filter Requests by Patient

1. Type in the last, first name in the “Filter by Patient” field located on the status page.
2. Select the patient name from the drop-down menu.



3. Requests for the selected patient will be displayed on the status page.
4. To go back to the full list of requests (main status page), click on the status page link located in the top-level navigation.

