PAN Foundation

HOW TO:

ENROLL PATIENTS AND VIEW GRANT DETAILS

This portal guide will take you through the steps to enroll a new patient in the portal and access their grant details, such as their grant balance, patient ID, and eligibility dates.

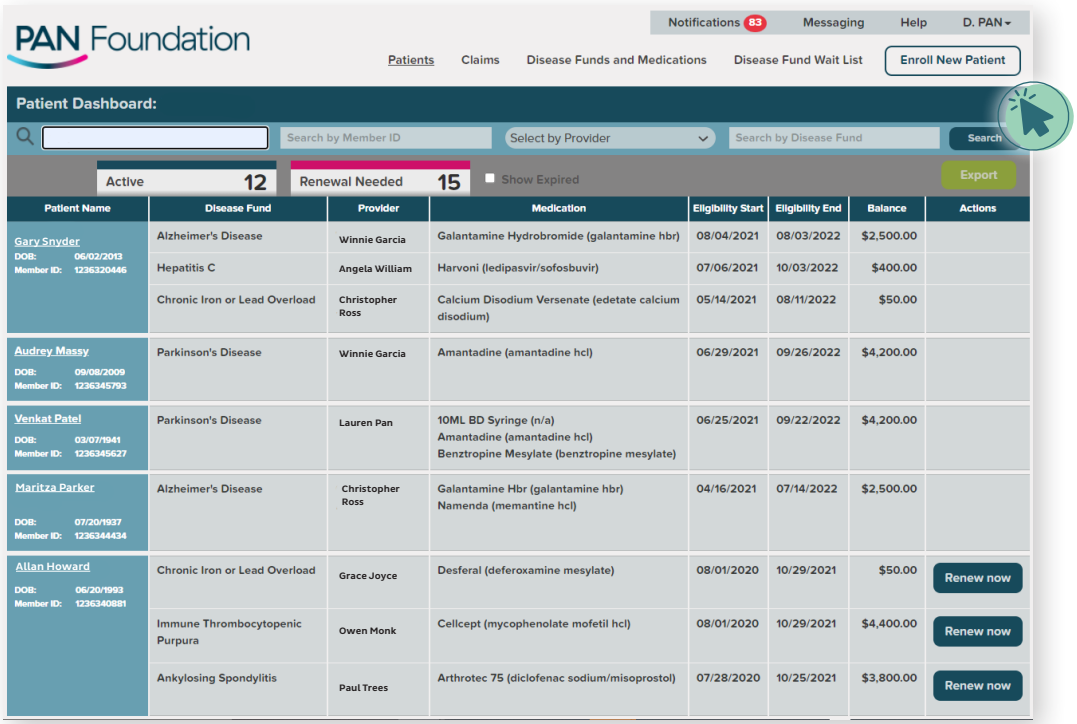
How to enroll a new patient

Please note: before you enroll a patient, you will need the patient's demographic information including their social security number, address, contact information, insurance, diagnosis, medication, household income and size, and physician information.

1. Log in to your provider or pharmacy portal account.

   NOTE: It's important that each user has individual login information. To keep your information as secure as possible, you should avoid sharing access to your account.

2. After logging in, you will always arrive at the "Patient Dashboard." Click on the **"Enroll New Patient" button** in the upper right-hand corner of the screen.



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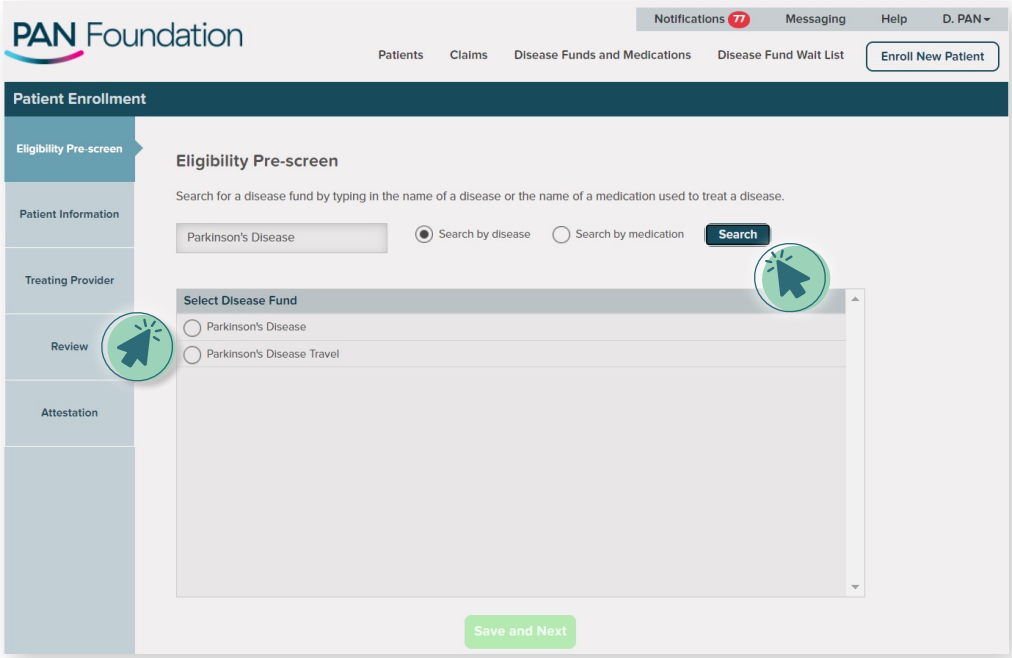
On the "**Eligibility Pre-screen"** page, choose search criteria either by disease fund or medication name.

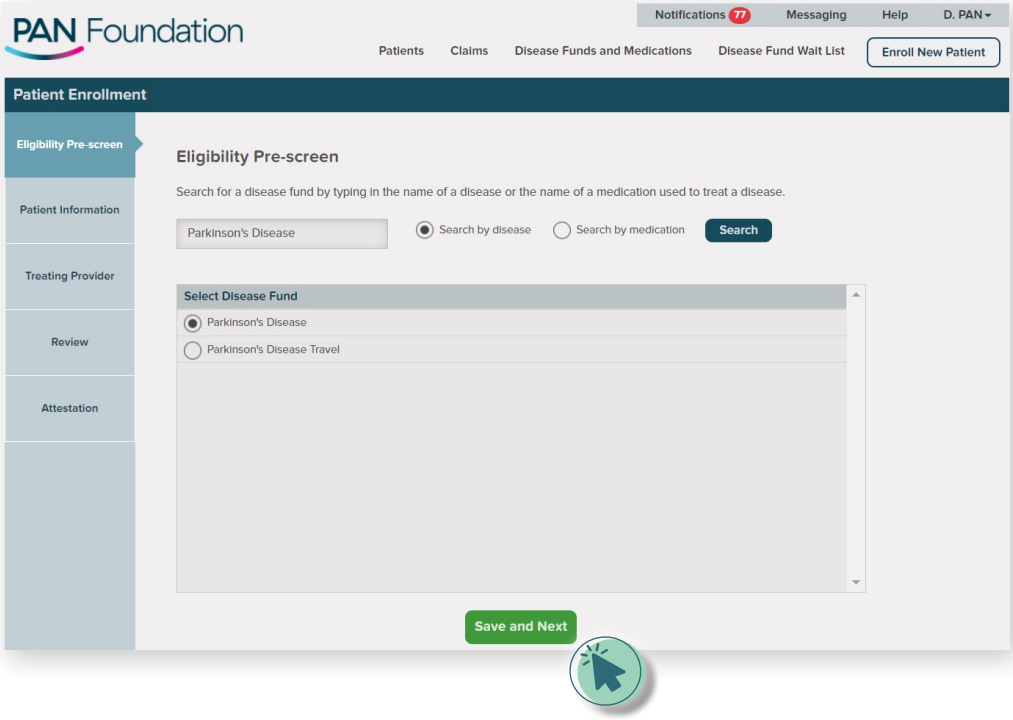
4

Next, type the appropriate disease state or medication name depending on your search criteria and **click search** to find the right program.

NOTE: You should check the PAN website to make sure the diagnosis code or disease subtype is covered under the specific disease fund. Just go to the Find a Disease Fund webpage, select the appropriate disease fund, then scroll down to the About the Disease section at the bottom of the page.

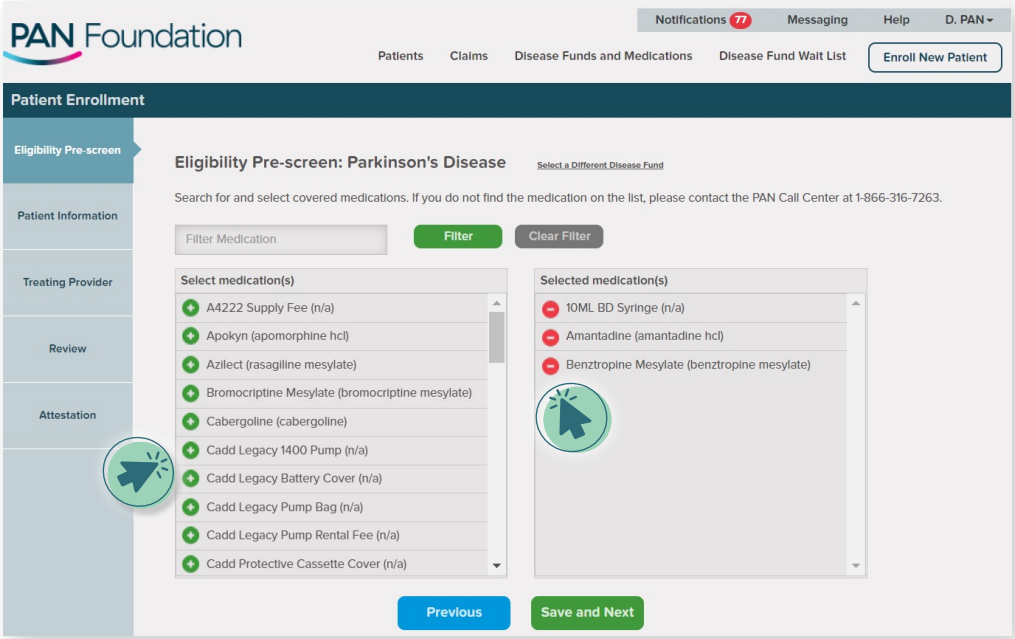


5 Select the applicable disease fund for your patient. Then, click the green **"Save and Next" button**.

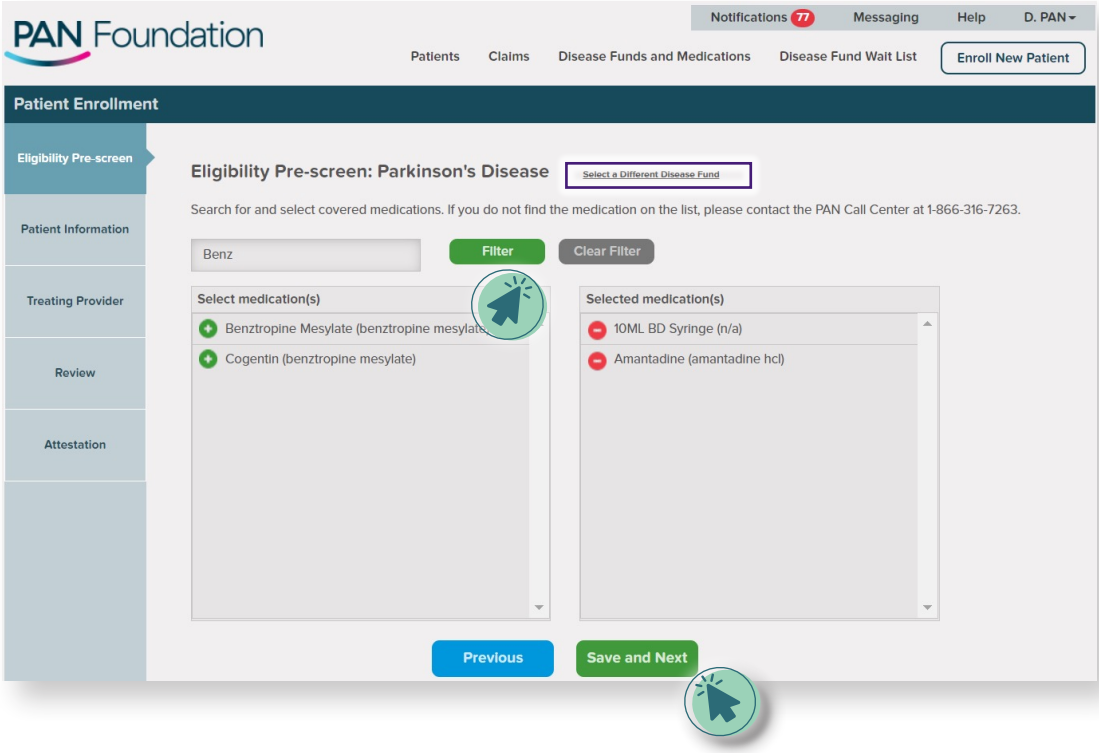


6 Next, select the PAN-covered medication(s) the patient is taking for the associated disease state. If the medication you are looking for is not listed, it is not covered by PAN. If you want to suggest a new medication or disease fund, you can do so by filling out our Contact Us form.

a. Select medications for your patient by clicking on the **green plus sign**, next to the medication name. Remove selected medications by clicking on the **red minus sign**, next to the medication name.



b. Or, enter the name or first few letters of the medication in the "Filter Medication" search box. Then click the green **"Filter"** button.
To choose a different disease fund, click "Select a Different Disease fund" in the top right corner. To clear the filter, click the gray **"Clear Filter"** button.



7 When you have selected all your patient's applicable medications, which will appear in the "Selected medication(s)" column, click the green "**Save and Next" button**.

NOTE: If the fund is NOT open, you will get an ineligible notice to sign up for the disease fund wait list. Click **Yes** to add your patient to the waitlist and enter all the required patient information, including social security number, date of birth, phone number, address, etc. Add the provider's information, including a valid email address, then click the green **"Submit" button**. A success box will confirm that your patient was added to the wait list along with the patient's unique wait list ID.

For more information about the disease fund wait list, review our [disease fund wait list FAQs.]

Sign up for the Disease Fund Wait List

Would you like to add your patient to the wait list ? ◉ Yes ○ No

Patient Information

*First Name: Bella | Middle Name: | *Last Name: Ray

*SSN: ••• •• 2333 | *DOB: 03/01/1941 | *Phone: (222) 333-5555

Email: bellaray@gmail.com | Confirm Email: bellaray@gmail.com

*Address: 222 Flower Petal Lane | Apt./Suite:

*City: Los Angeles | *State: California | *ZIP: 90211

Please note: If you make any changes on this form, it will overwrite the information currently stored in our system for this patient.

Provider Information

*First Name: Doctor | *Last Name: PAN | ☐ Add Provider

*Email: doctorfriendly@gmail.com | *Confirm Email: doctorfriendly@gmail.com

Submit

Success

Wait List ID: CM1001054032

Your patient has been successfully added to the Disease Fund Wait List. You will receive an email when assistance is available. At that time, if your patient still needs assistance, you will have 2 business days to submit an application. Be sure to check your email regularly so you don't miss your opportunity to apply.

Your patient's place on the wait list does not guarantee assistance. Assistance is awarded to eligible applicants on a first-come, first-served basis, and subject to each fund's criteria.

OK

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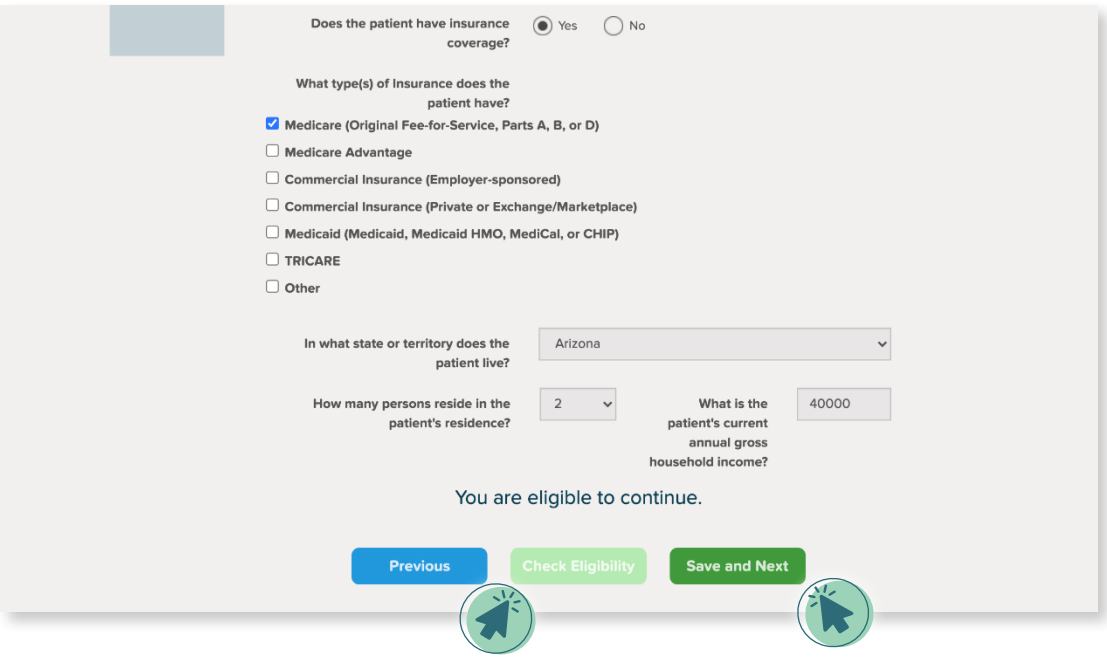
If the fund is open and accepting applications, the pre-screen eligibility questionnaire will appear. The pre-screen questions verify that your patient meets the eligibility requirements for the fund.

a. The questions will ask for patient information such as U.S. residency status, insurance coverage and type, state of residence, household income, and size. Complete these fields, then click the green "**Check Eligibility" button** to confirm if the patient is eligible to continue. If so, click the green **"Save and Next" button**.



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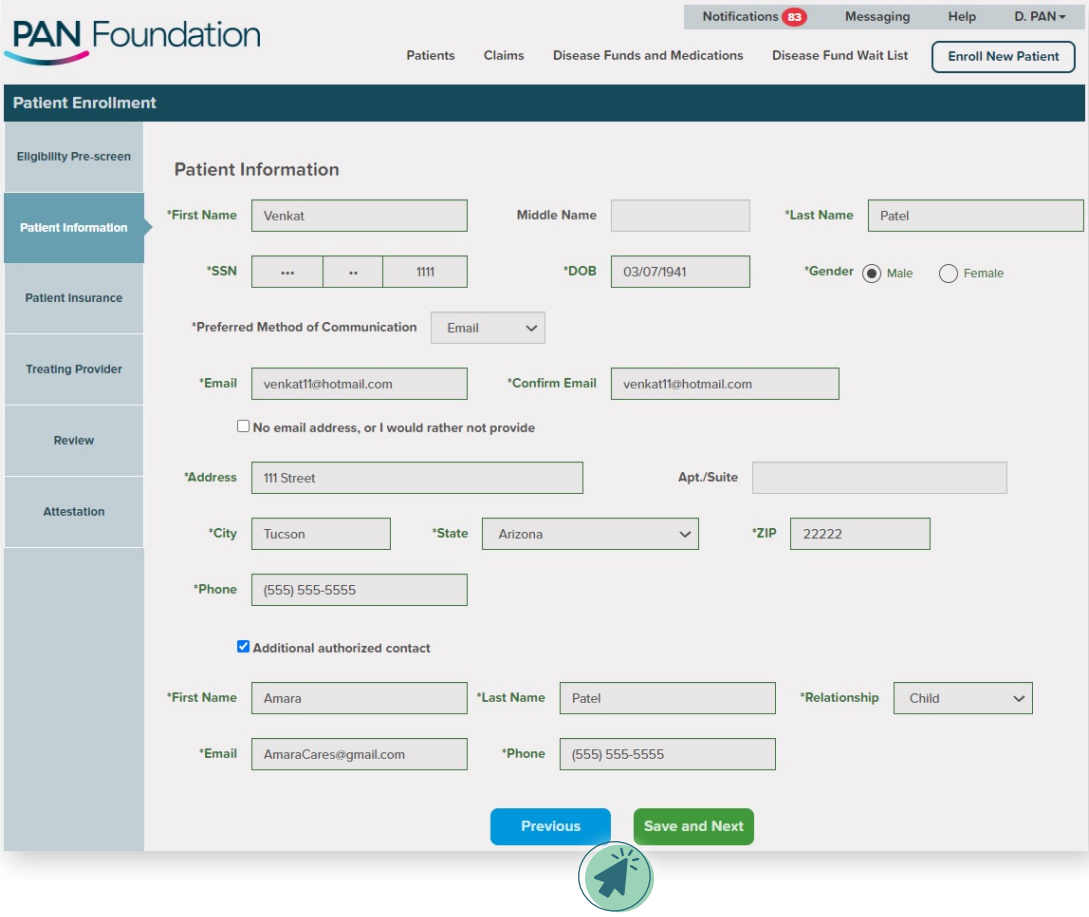
Next, enter all the required patient demographic details, including their home address, social security number, and date of birth. This information is required for security purposes. Also, please choose a preferred method of communication.

Note: If the patient does not have an email address or does not want to provide one, click the no email address box to opt-out. If the patient does not wish to provide a social security number, please contact PAN to apply. You may also enter an additional authorized contact here. Click the green **"Save and Next"** button to continue.



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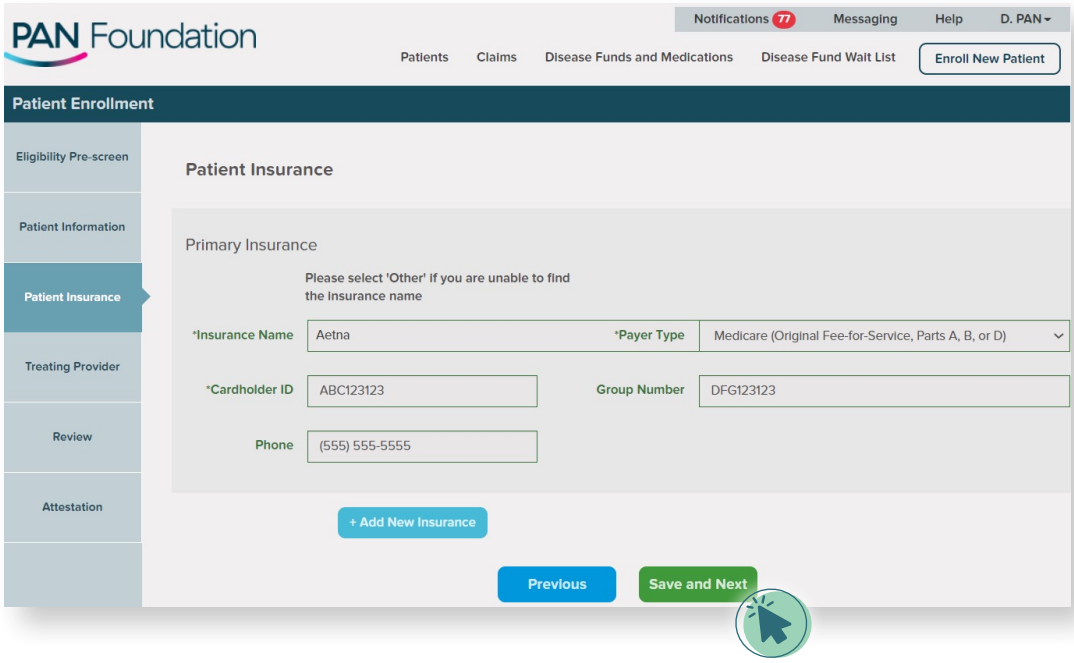
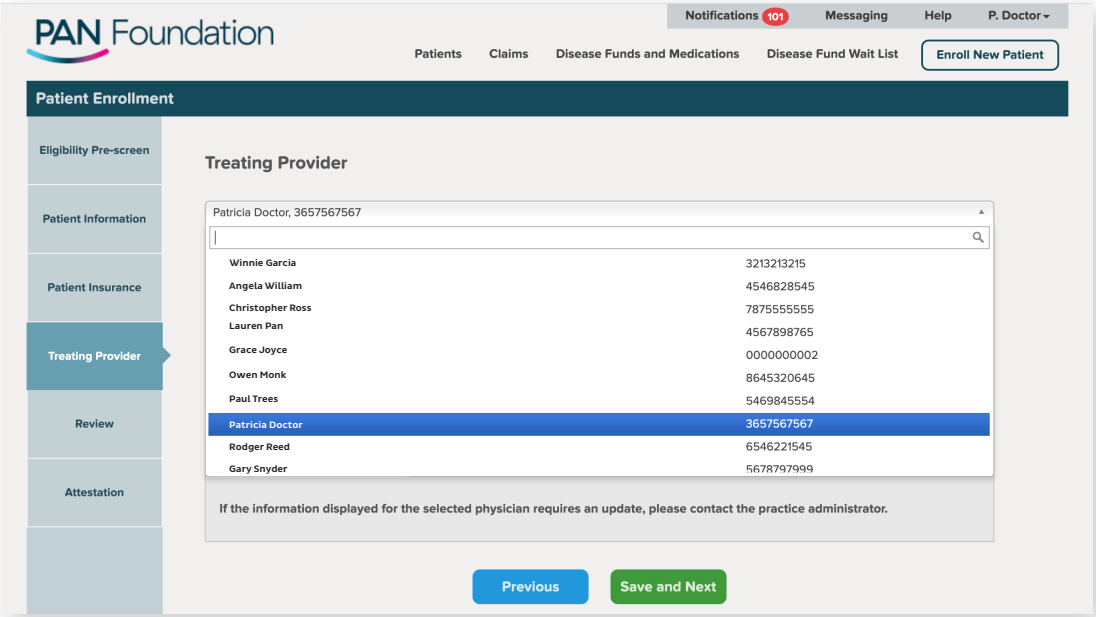
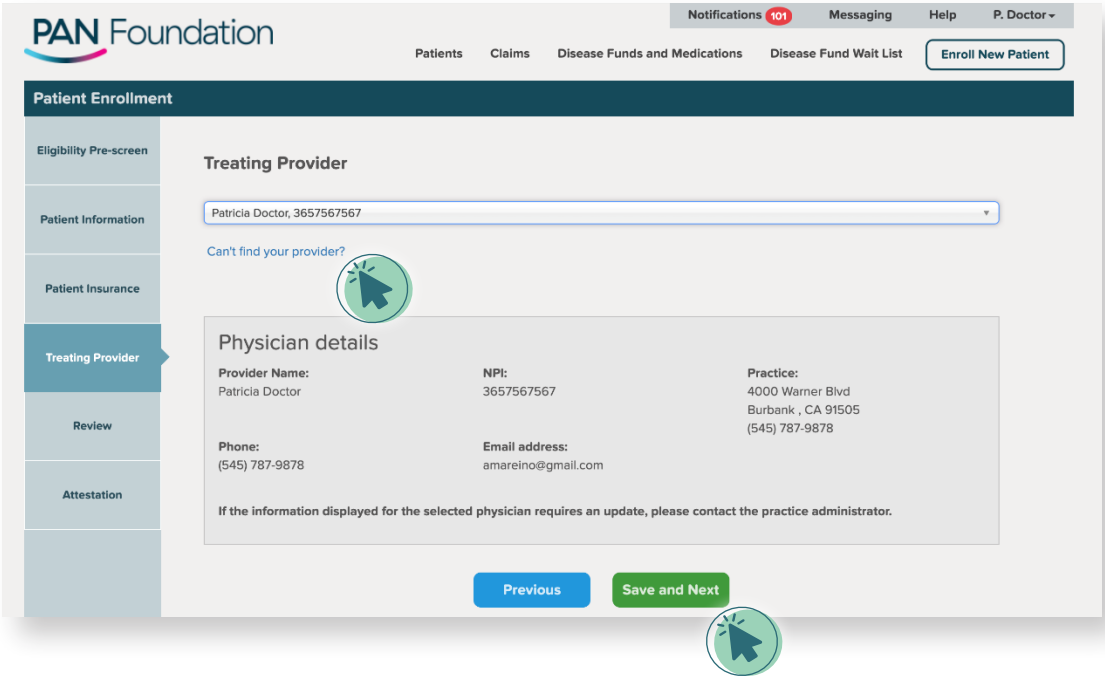
Enter the patient's insurance information, including payer type, cardholder ID, group number, and phone number. If the patient has additional insurance, click the blue "**Add New Insurance"** button. To continue, click the green **"Save and Next"** button.



11 Now select the treating provider for your patient.

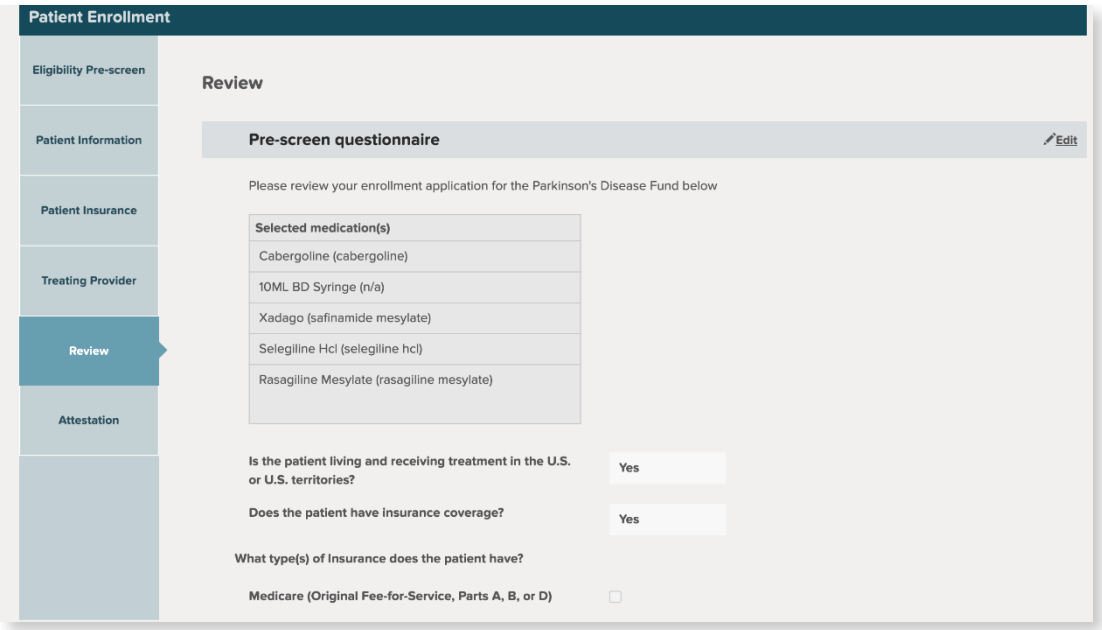
a. Find the drop-down list containing all providers associated with the account. To add a new provider, visit your account settings and select the "**Manage Providers" tab** and click **"Add a New Provider."** If you can't find the provider in the drop-down list, click **"Can't find your provider?"** This lets you search for a provider by last name and state or NPI.

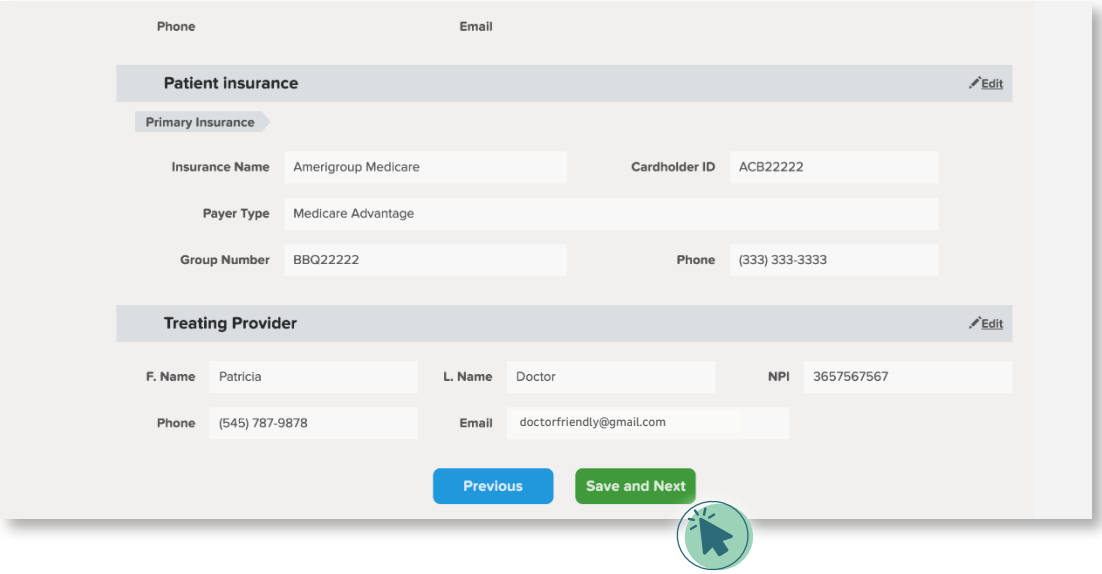




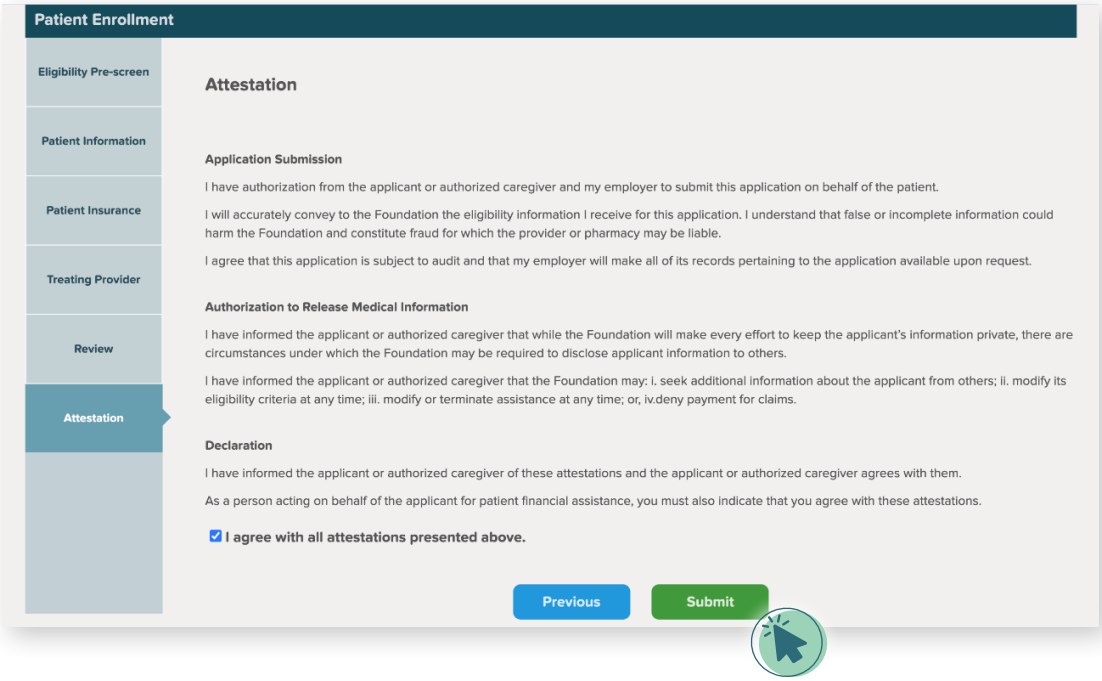
12 To continue enrolling the patient, select a provider and click the green **"Save and Next"** button.

13 Next, review the pre-screen questions to make sure the information is accurate and complete. Click the "edit" button next to the pencil icon to make any changes. After reviewing, click the green **"Save and Next"** button.

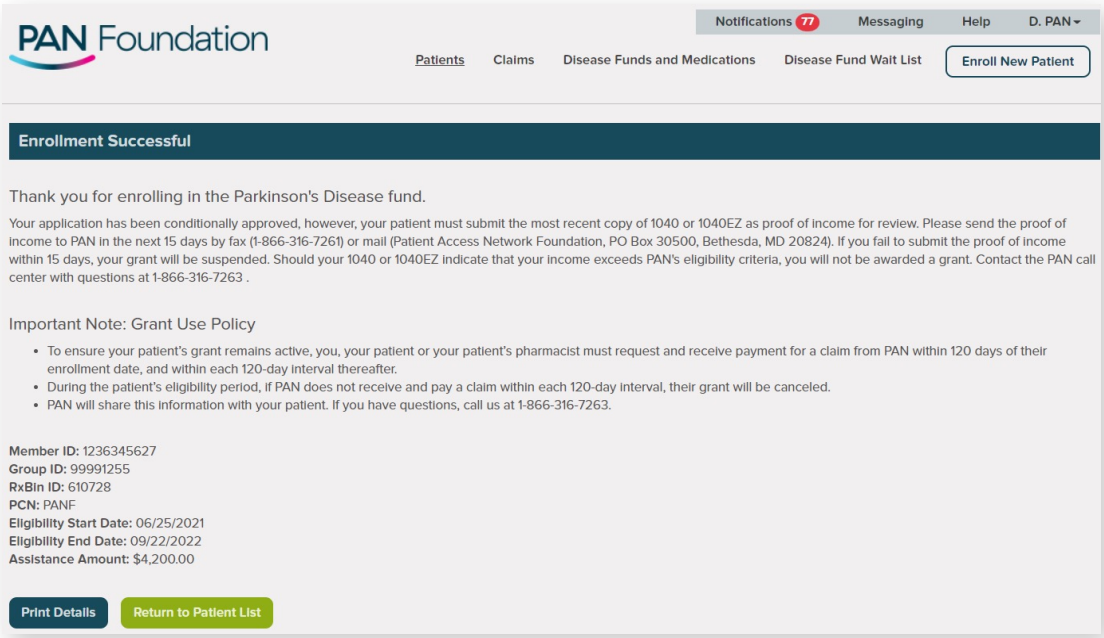




14 Finally, read and check that you agree with the authorization attestations and declaration. Then, click the green **"Submit"** button. The system will now process the application.



15 If the patient enrollment is successful, you'll receive a confirmation with enrollment details such as PAN ID, RxBin ID, PCN, and Group ID number instantly, which you can print. A copy will also be saved in your portal account, and your patient will also get a copy of this information by email or mail.

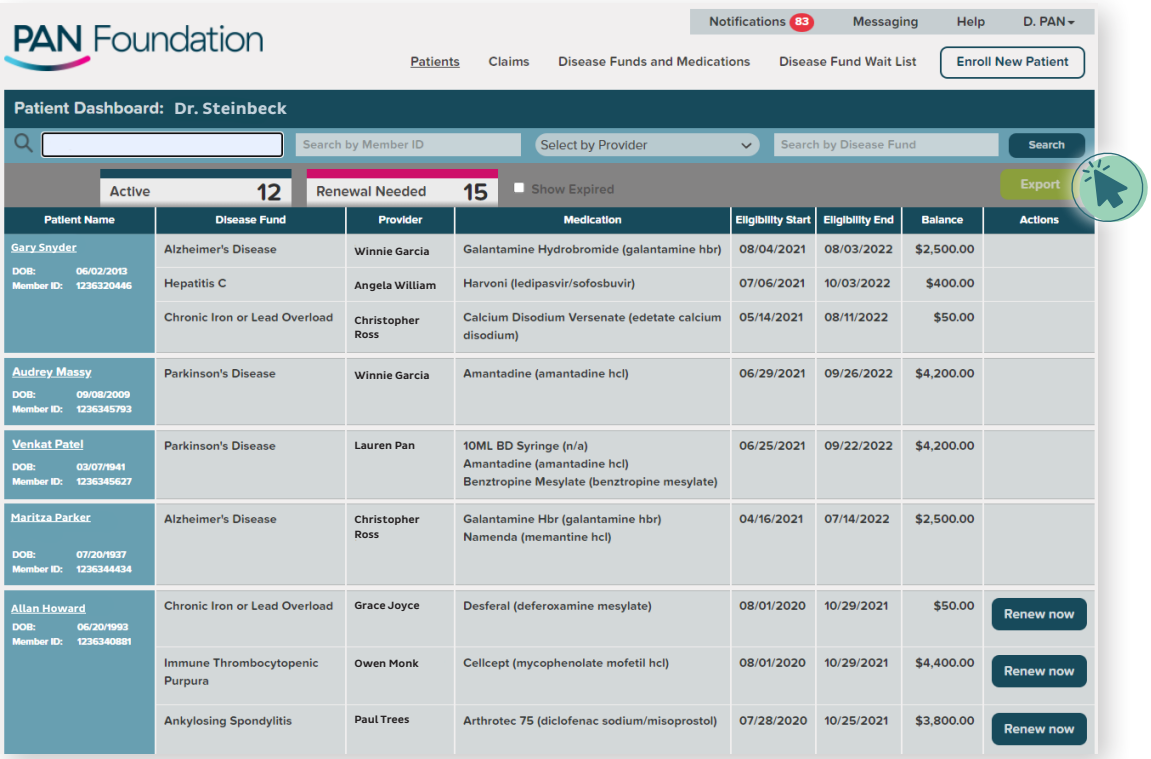


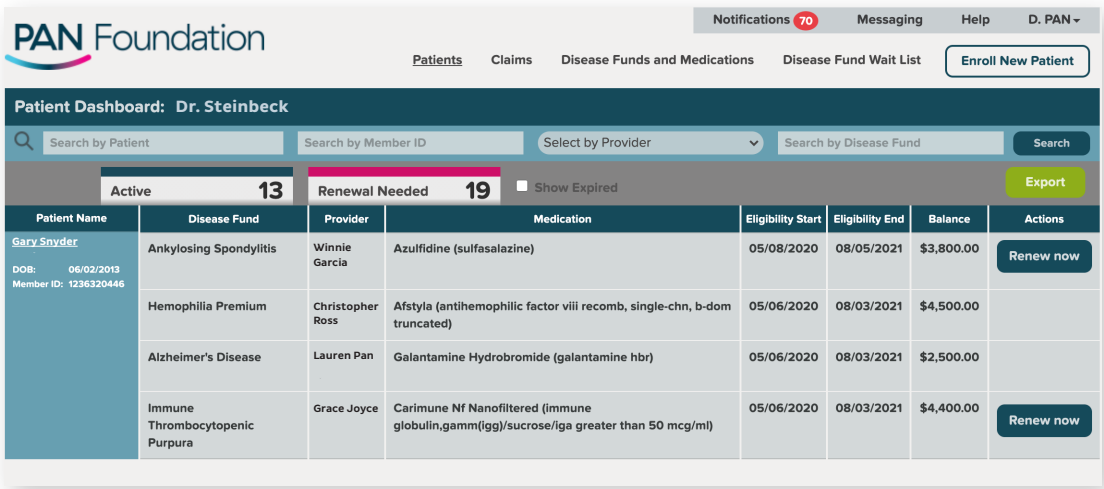
How to view grant details

Once you've enrolled your patient, you can view their grant information.

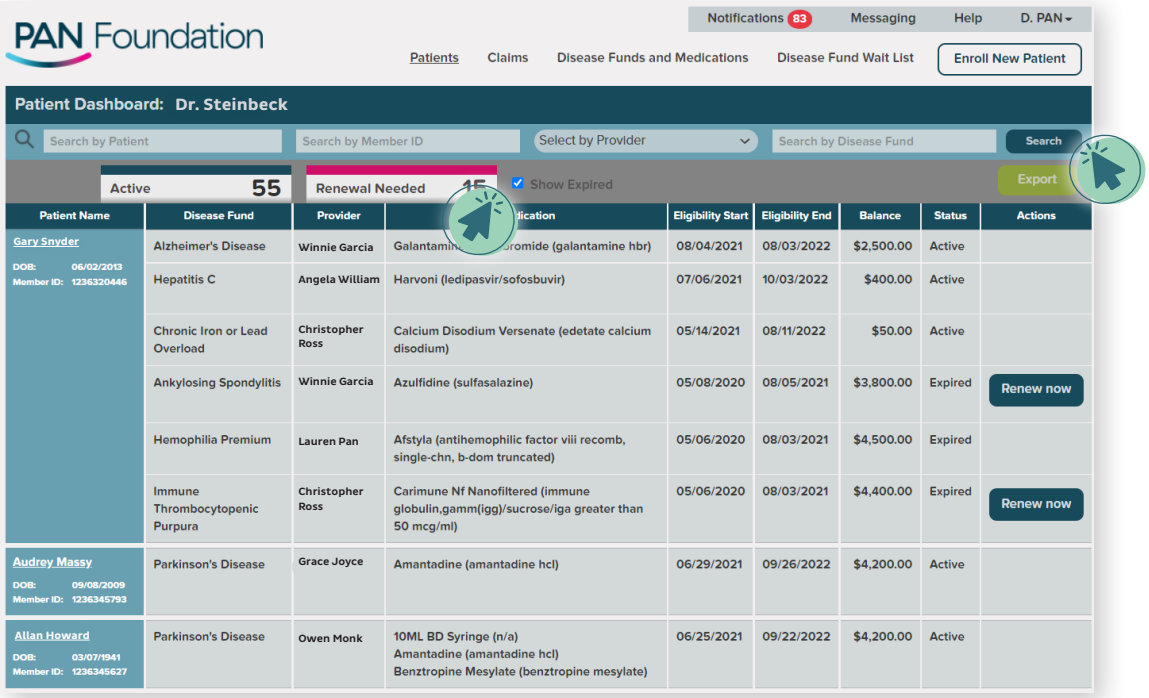
1. Log in to your portal account.

2. Use the search fields in the Patient Dashboard to search for a patient by name, member ID, provider, or disease fund. Click the blue **"Search" button**.





NOTE: Search results will only show patients with active grants. To view ALL patients (including those that are inactive), re-enter your search terms and click search, then check the **"Show Expired" box** below the search fields. Then click the blue **"Search" button** to find all results for both expired and active grants.



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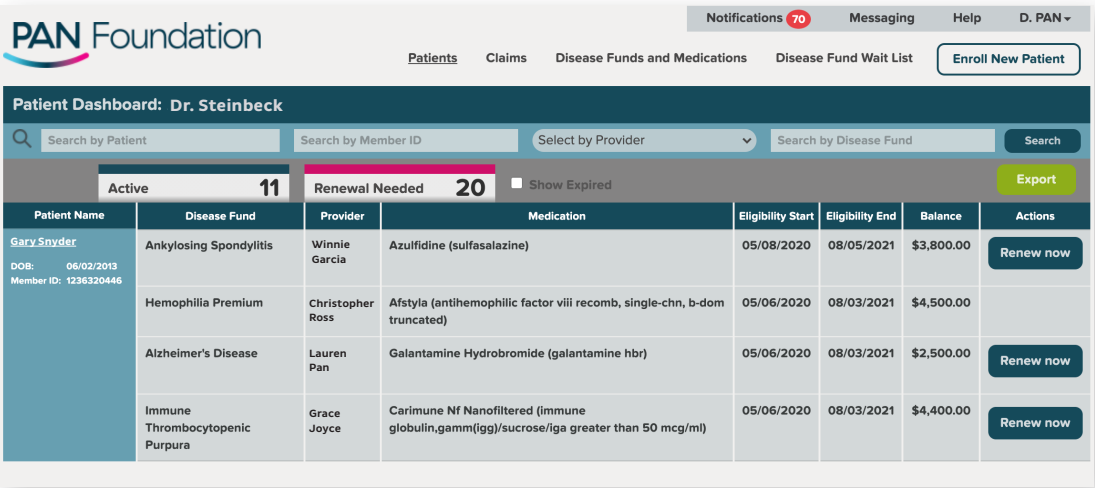
Your patient's information will appear, along with their corresponding disease fund(s), provider(s), medication(s), eligibility start and end dates, grant balance(s), and actions.



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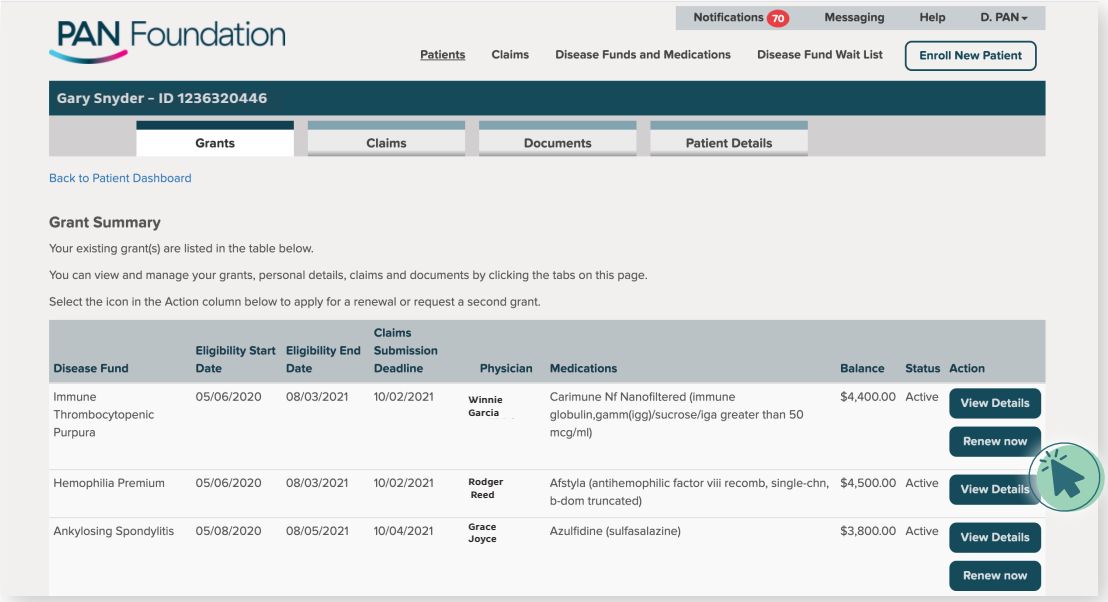
Click on the patient's name to find the grant summary page, containing the claim submission deadline. In the summary table, click the blue **"View Details"** button under the **"Action" column** to find grant details. This includes the total grant amount, current balance, and the date the funds were awarded.



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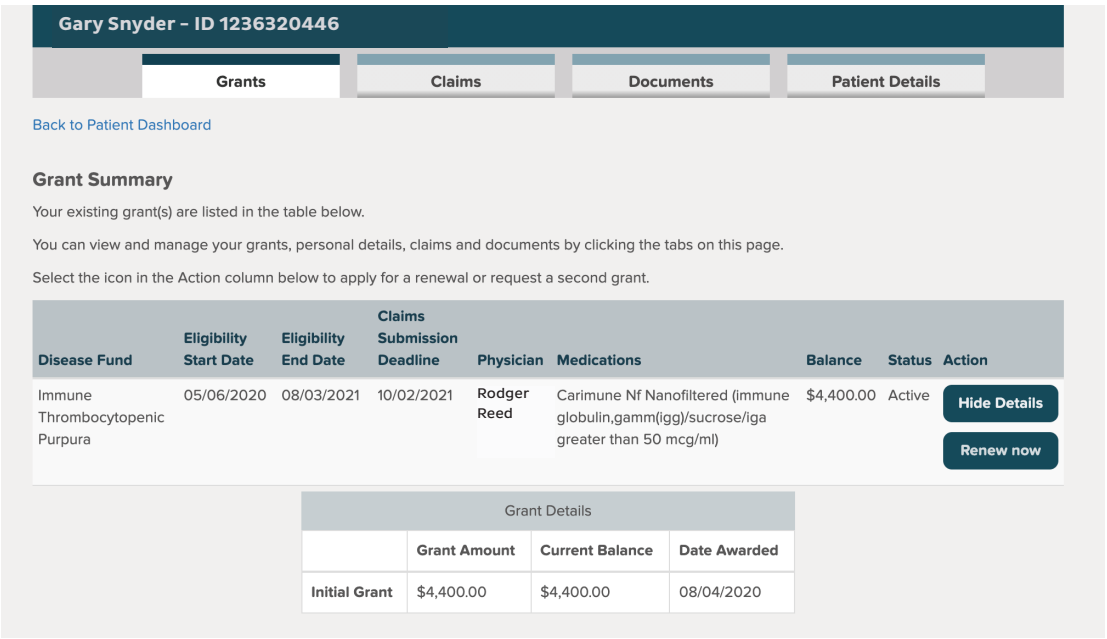
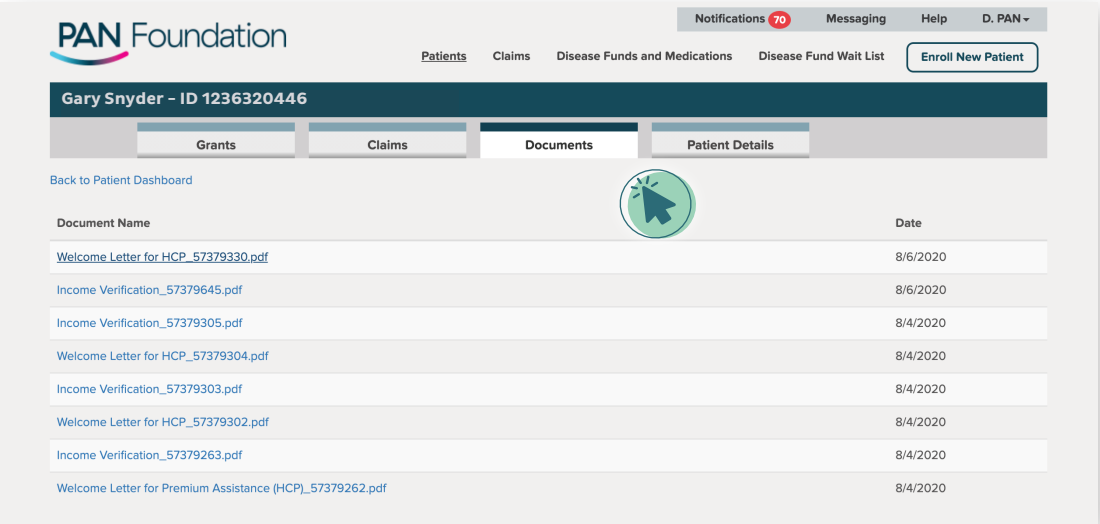
Above the grant summary table are tabs for grants, claims, documents, and patient details.

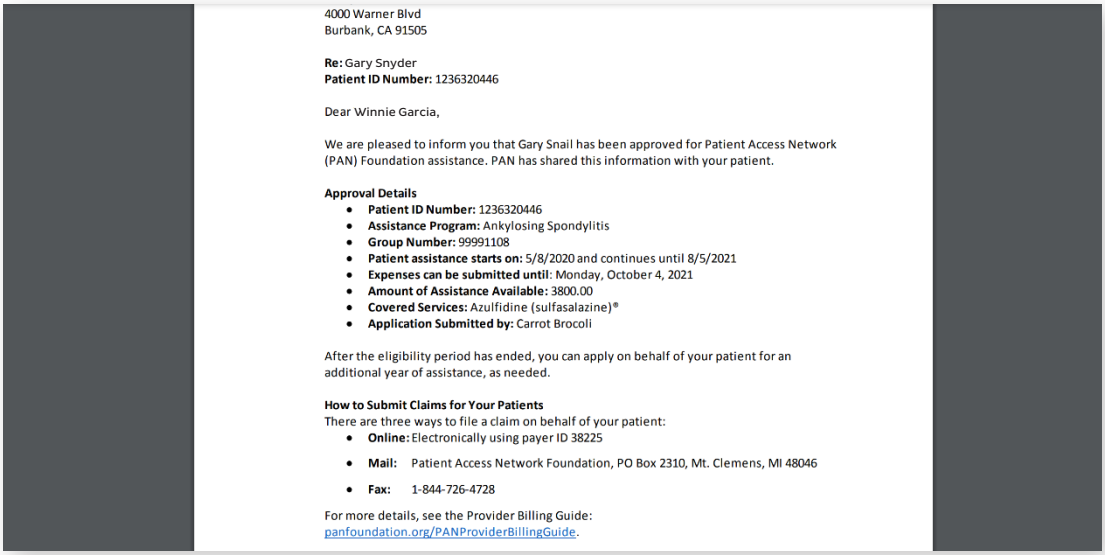


6 In the claims tab, you can upload and find processed claims.

7 In the documents tab, you can click the PDF links to find patient documents such as welcome, grant use policy, and, if needed, income verification request letters. Welcome letters contain claim processing information such as the patient ID number and eligibility dates.

> **NOTE:** If income verification is needed, the patient will get an email or mailed letter and has 15 business days to respond.





4000 Warner Blvd
Burbank, CA 91505

Re: Gary Snyder
Patient ID Number: 1236320446

Dear Winnie Garcia,

We are pleased to inform you that Gary Snail has been approved for Patient Access Network (PAN) Foundation assistance. PAN has shared this information with your patient.

Approval Details

- **Patient ID Number:** 1236320446
- **Assistance Program:** Ankylosing Spondylitis
- **Group Number:** 99991108
- **Patient assistance starts on:** 5/8/2020 and continues until 8/5/2021
- **Expenses can be submitted until**: Monday, October 4, 2021
- **Amount of Assistance Available:** 3800.00
- **Covered Services:** Azulfidine (sulfasalazine)®
- **Application Submitted by:** Carrot Brocoli

After the eligibility period has ended, you can apply on behalf of your patient for an additional year of assistance, as needed.

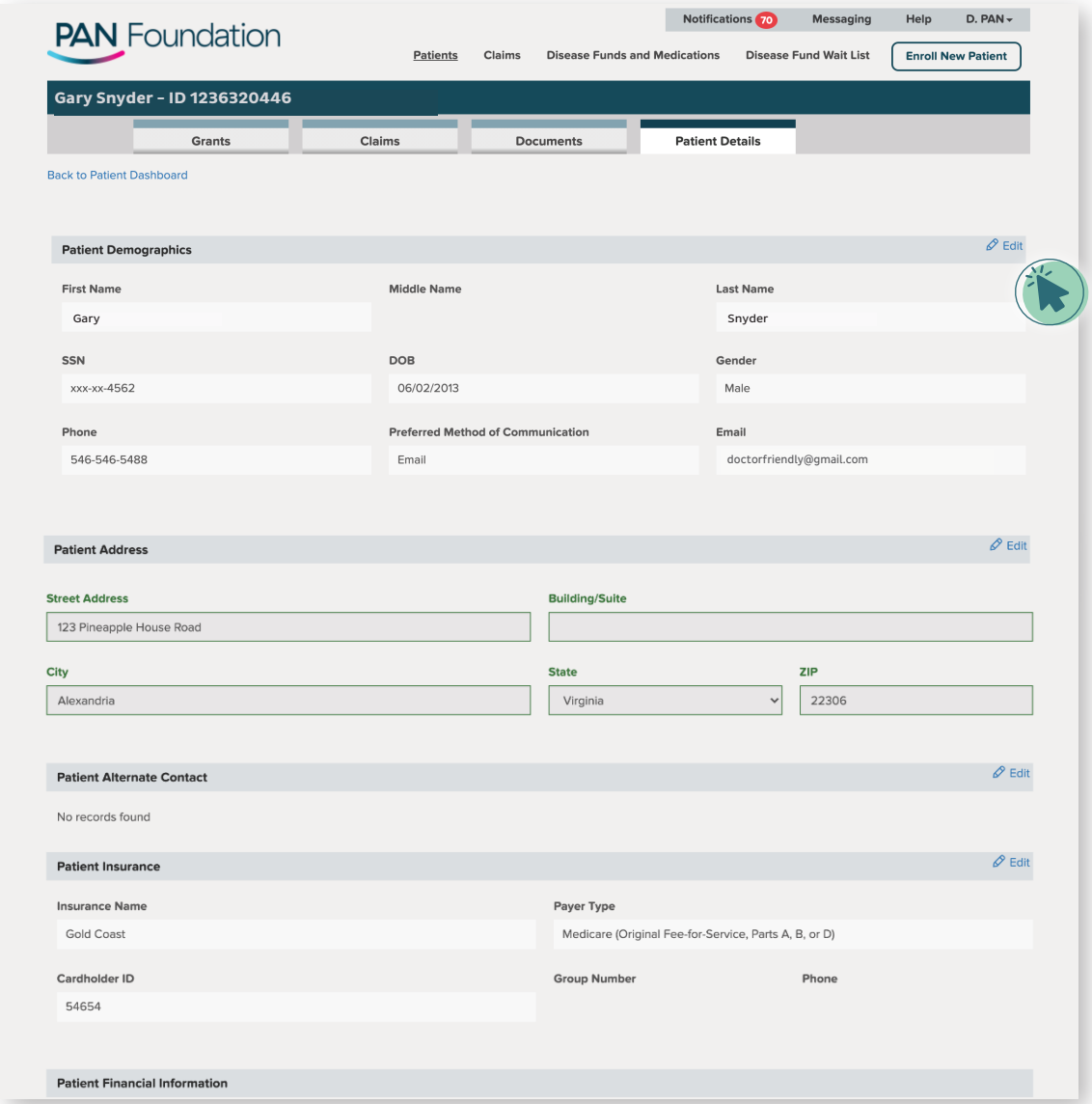
How to Submit Claims for Your Patients
There are three ways to file a claim on behalf of your patient:

- **Online:** Electronically using payer ID 38225
- **Mail:** Patient Access Network Foundation, PO Box 2310, Mt. Clemens, MI 48046
- **Fax:** 1-844-726-4728

For more details, see the Provider Billing Guide:
panfoundation.org/PANProviderBillingGuide.

Patient details may also be reviewed and edited in the “Patient Details” tab. Click **“Edit,”** next to the pencil icon of the section you want to update (e.g., patient address). After making your edits, click “**Save” or “Cancel”** to continue.

> **NOTE**: A patient’s date of birth and social security number can’t be edited.



For more information about enrollment or how to use the PAN portal refer to our webinar library, our other how-to guides, or review the Pharmacy or Provider FAQs.

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panfoundation.org