# Healthcare professionals: How to enroll a new patient in a disease fund using the PAN Portal

This document walks healthcare professionals through enrolling a new patient in a disease fund using the PAN Foundation portal.

## Enrolling your patients

Eligibility criteria varies by disease fund and type of grant. Find out if your patient qualifies for PAN grants by searching our disease fund list for open funds and complete the quick eligibility screening. You'll find out immediately if you're eligible to continue with the application.

**Steps in the portal**

1. Go to the PAN portal and log in to your existing account.

2. Once logged in, go to the "Patients" tab and select the "New enrollment" button in the upper right-hand corner.

3. You can then search by either your patient's disease or medication.

   - If the disease fund is open it will say "Open" next to the disease fund name in the search bar. If the fund is not open, you can still sign up for the wait list.

4. Select the disease fund you're interested in and then select "Next."

5. On the next screen, click the plus sign next to any medications your patient is taking for this specific disease. Then, click "Next."

6. Next, please confirm that the medications you picked are accurate.

   - If you've missed any medications or something does not look right, you can select the minus sign next to any medication you'd like to remove or "Add another medication" to add a new medication.

7. Once your list of medications is correct, select "Yes, begin application."

8. To begin the patient's application, you'll fill out the eligibility pre-screen. After completing each section, select "Next."

   - The pre-screen asks about where your patient lives, as well as their insurance type, household, and gross income.

9. Once you've completed the eligibility pre-screen, you'll find out instantly if your patient is eligible for the grant.

   - If your patient does not meet fund specific eligibility requirements or if the disease fund is closed, the PAN Foundation provides a list of available alternate funding resources,

inclusive of commercial copay assistance programs and other assistance programs to your patient.

10. If your patient is eligible for the fund, continue the application by providing additional patient information including name, date of birth, social security number, demographics, preferred communication method, and address. Once completed, select "Next."

11. Then, provide the patient insurance information, including insurance type and cardholder ID, and select "Save and next."

12. Next, you'll review your application. If everything is accurate scroll to the bottom and select "Save and next."

    - If something does not look right, you can edit any information by clicking the "Edit" button in the right-hand corner of each section.

13. Finally, please read the patient attestation carefully and select "Submit application."

14. If the application was successful, you will find out instantly, and your patient can begin using their grant right away.

    - If your patient's application is incomplete, or missing information, you must start over with a new application.

    - If you need to submit a new application for the same patient who has already applied, you should contact the PAN Foundation at 1-866-316-7263.

For more information about how to manage a patient grant, check out our website at: www.panfoundation.org/grants