PHARMACY GUIDE

Applying for a TotalAssist grant for your patient

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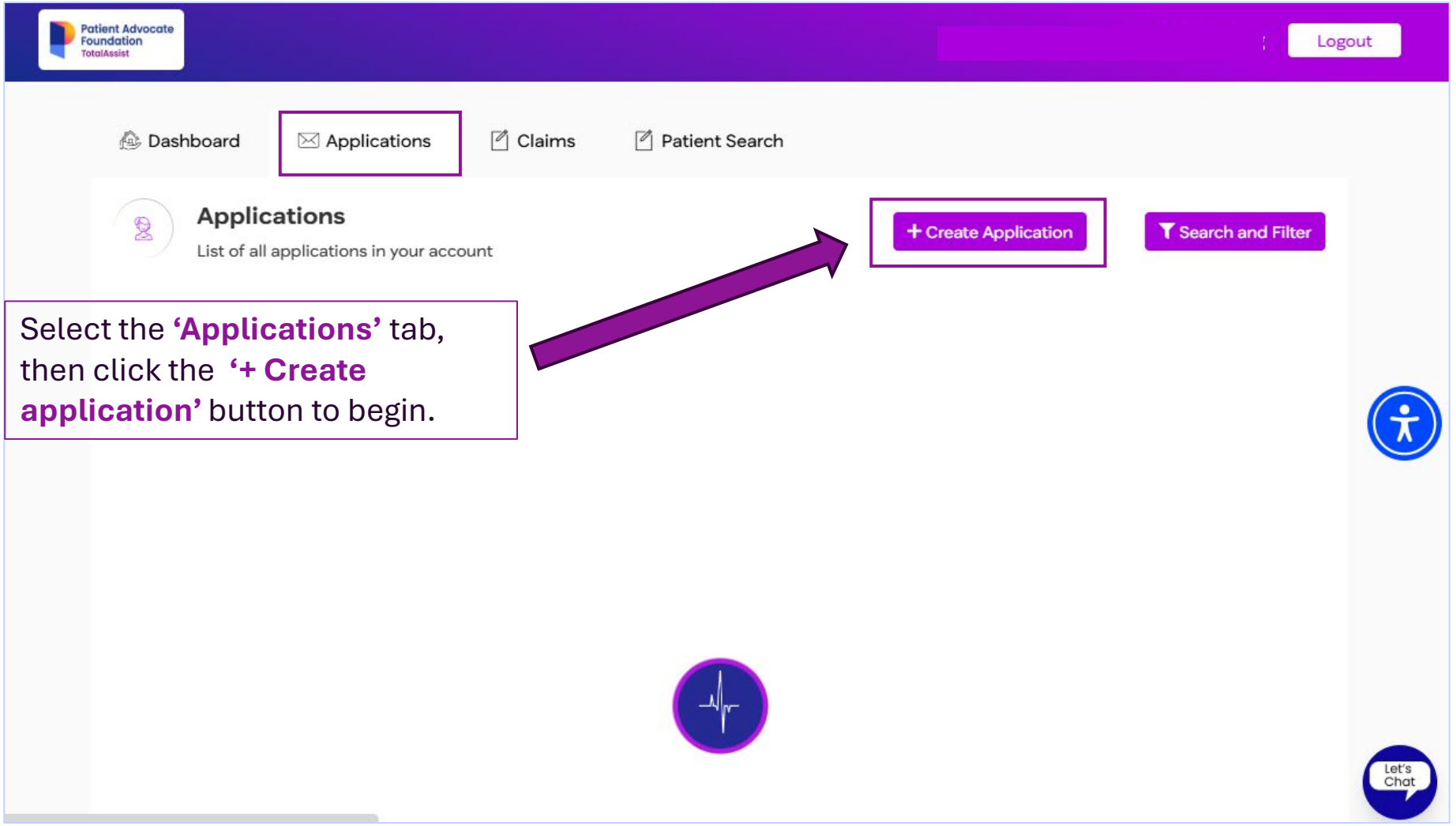
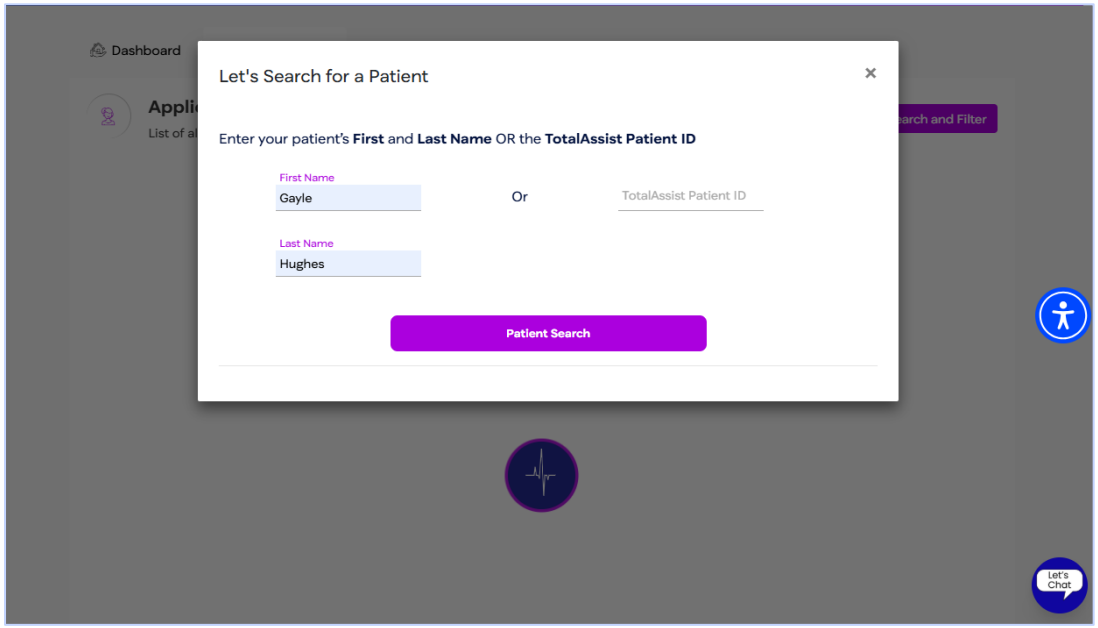
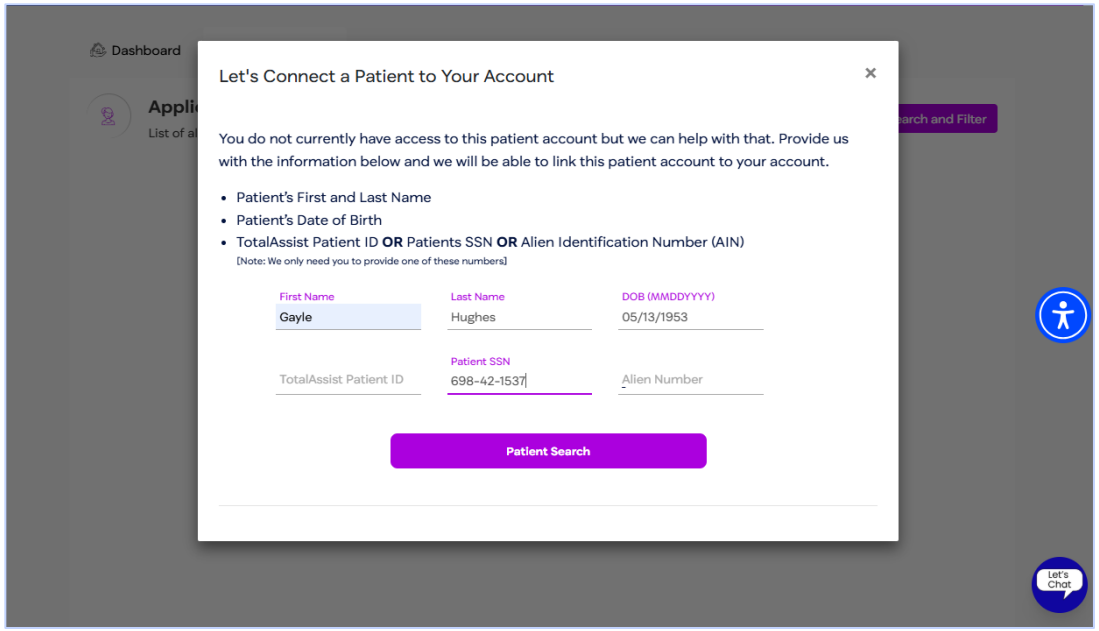
You will find out instantly if your patient has been approved, in most cases. If approved, your patient can begin using their TotalAssist grant right away.

Starting the application



Search for a patient (then connect to your account, if needed)

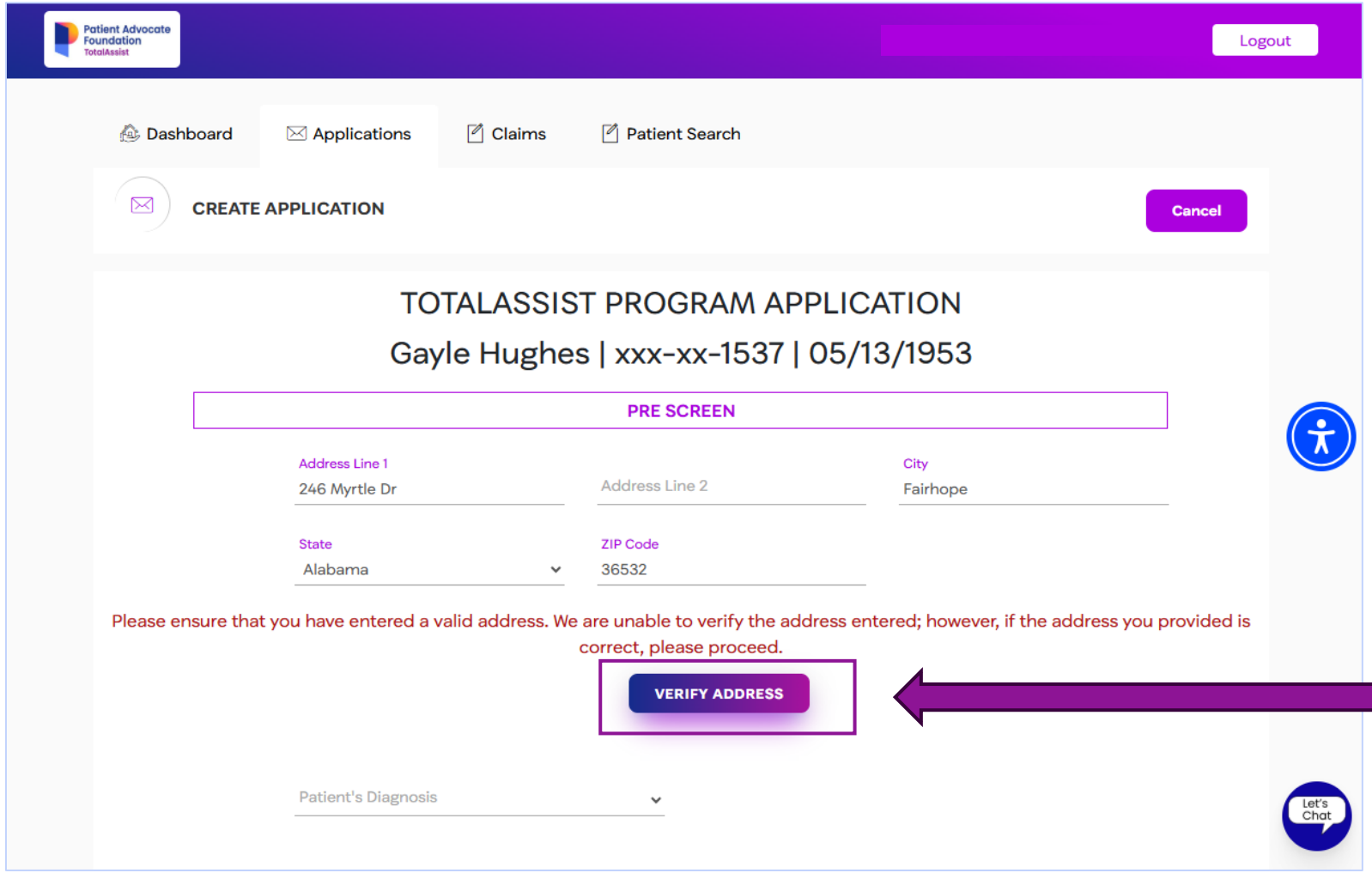




A patient search is required prior to starting every **application** so duplicate patient records aren't accidentally created.

Patient data is fictional.

1. Begin Pre-Screen

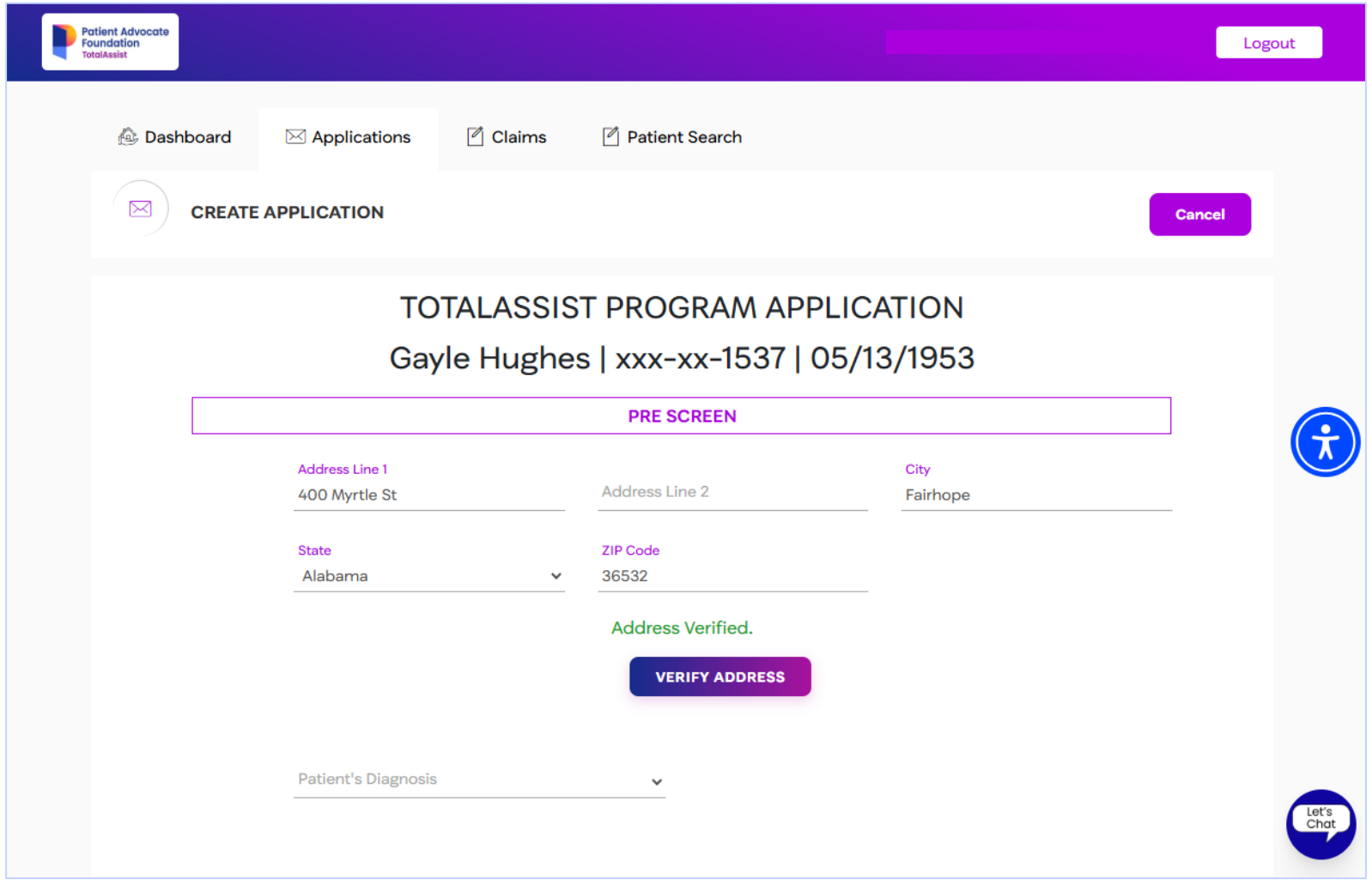


Enter the patient's physical address, then click **'Verify address'**.

The system will attempt to match the address with all known postal addresses. If unable to verify (as shown), please check for errors, then proceed if correct.

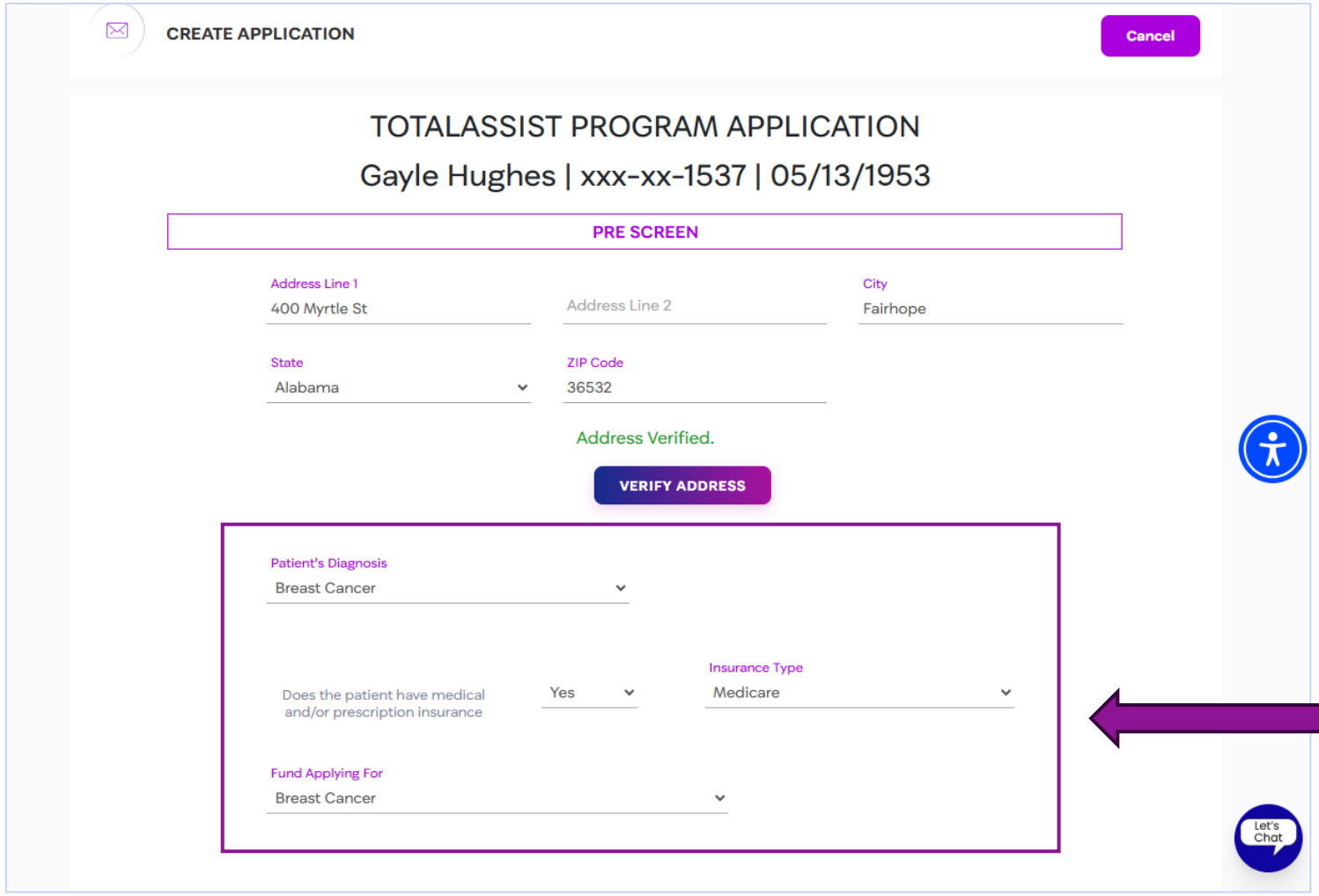
Patient data is fictional.

1. **Pre-screen** – continued



Patient data is fictional.

1. **Pre-screen** – continued



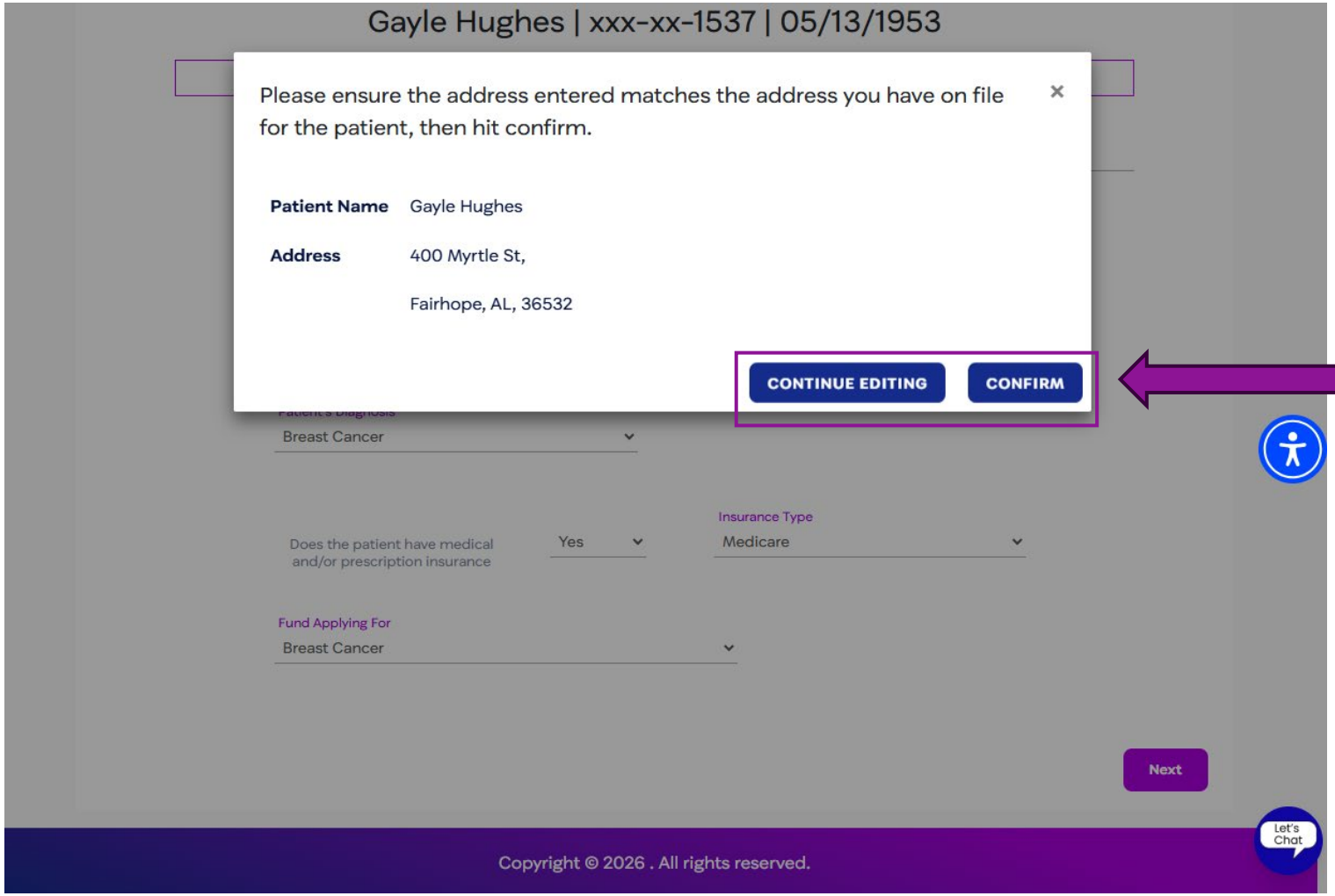
Select the patient's diagnosis from the drop down.

Answer insurance questions.

Select the TotalAssist fund you are applying for, then click **'Next'**.

Patient data is fictional.

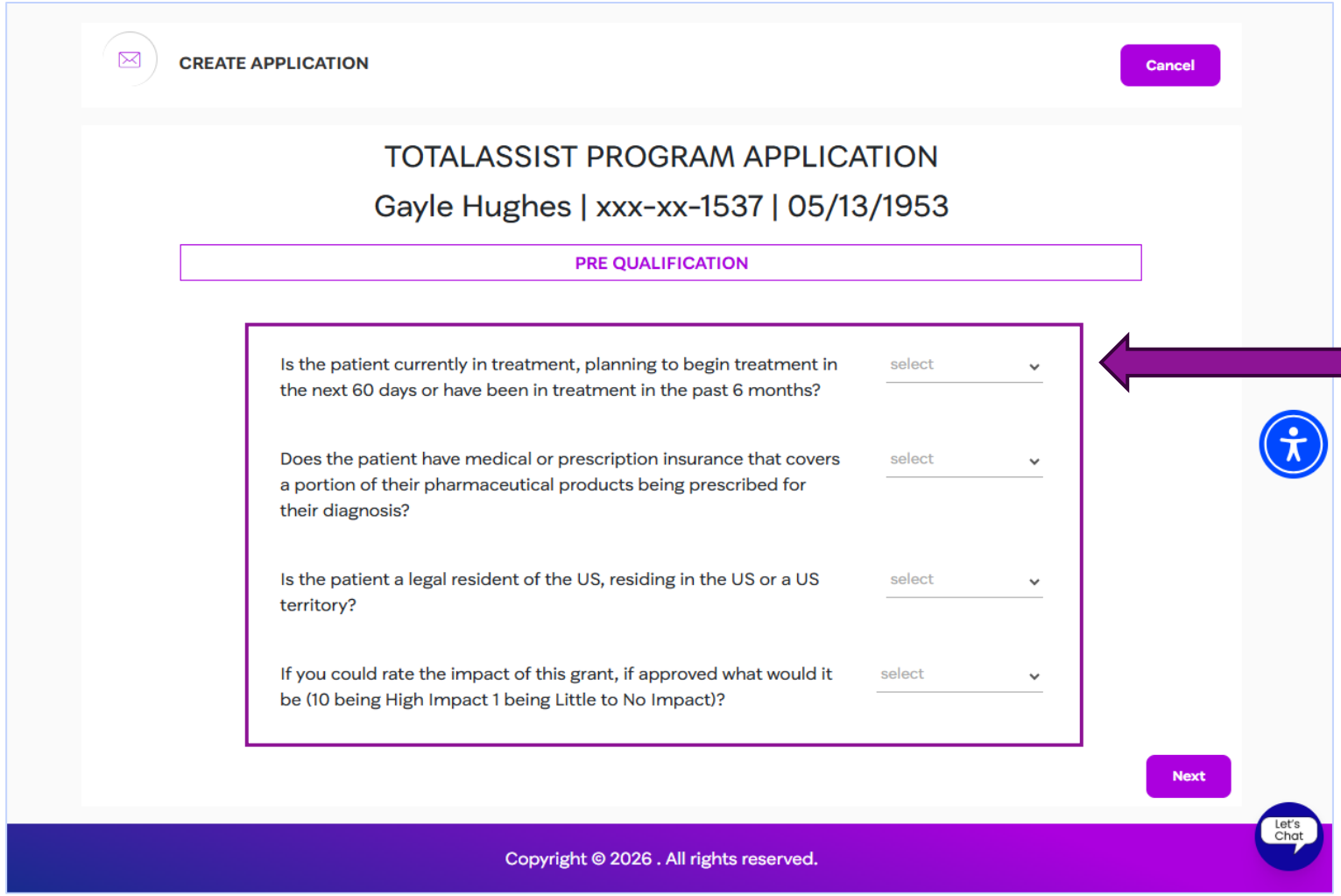
1. **Pre-screen** – continued



'Confirm' or **'Continue editing'** the patient's address before proceeding.

Patient data is fictional.

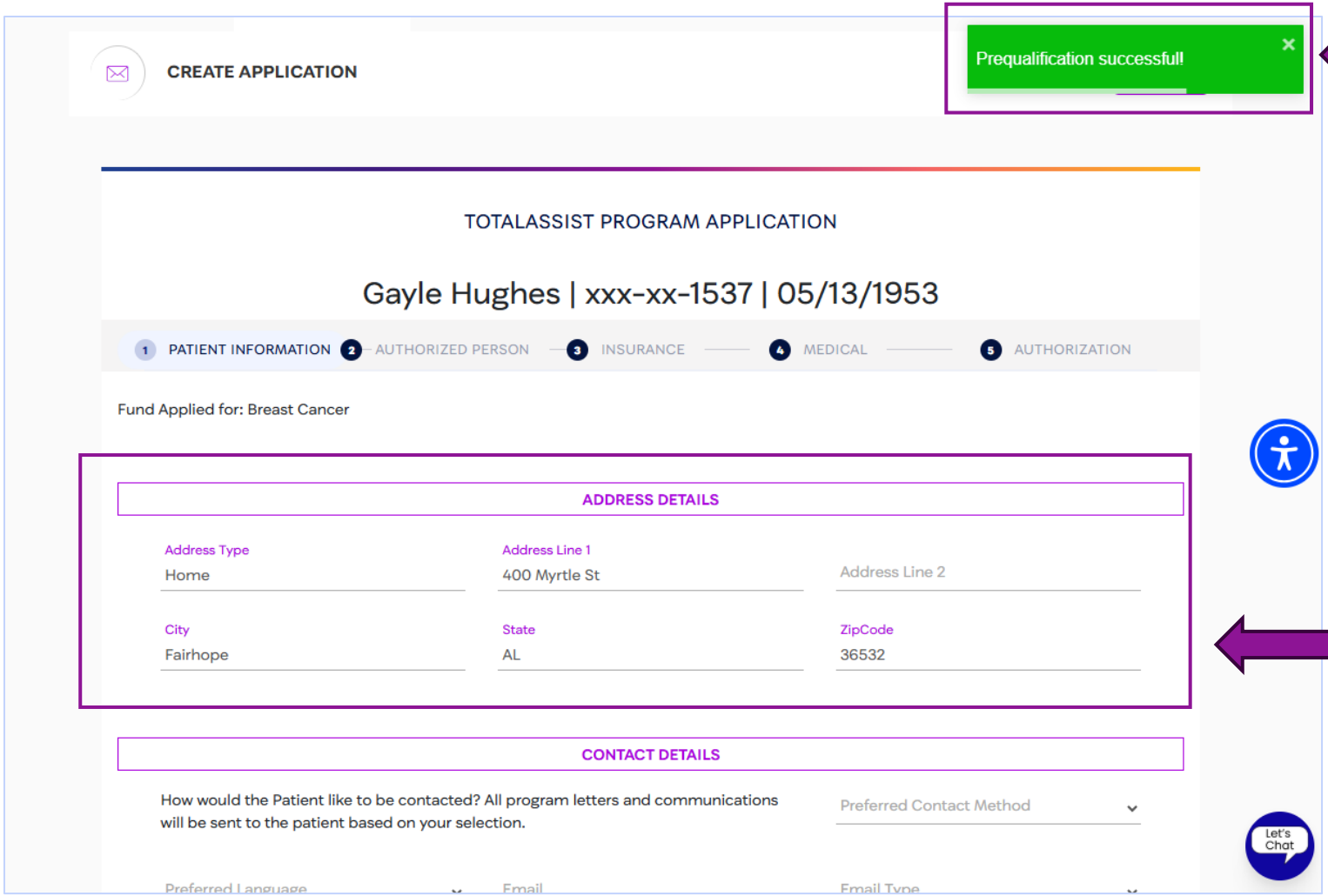
1. **Pre-screen** – continued



Answer pre-qualification questions, then click **'Next'** to complete the pre-screen.

Patient data is fictional.

Step 1. Pre-screen – complete



After completing the pre-screen, you will receive an on-screen pop-up notification.

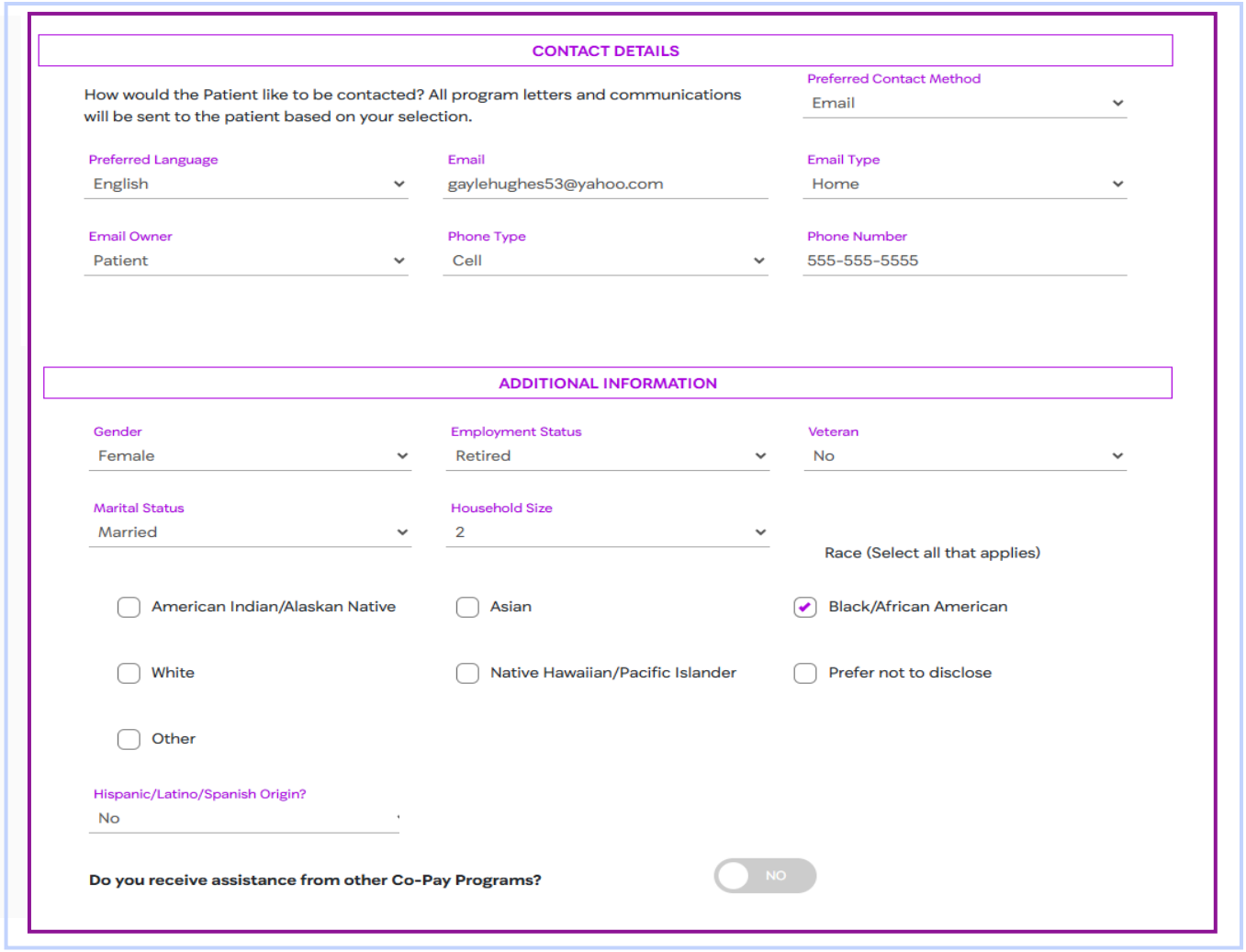
The notification will be green if prequalification was successful, and red if not successful.

If green, continue to patient information section.

Patient address details will pre-populate.

Patient data is fictional.

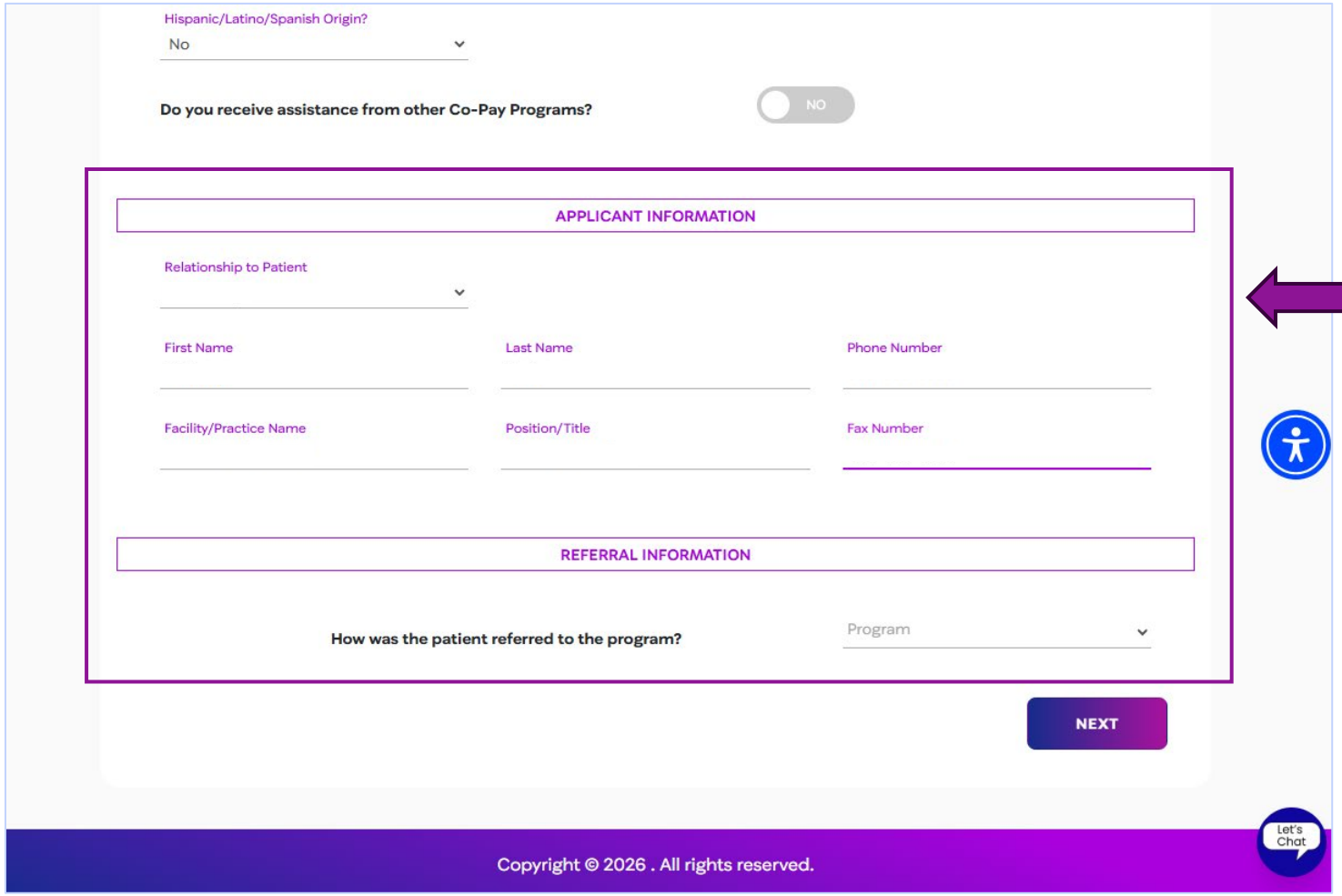
Step 2. Patient information



Scroll down and complete sections for **'Contact details'** and **'Additional information'.**

Patient data is fictional.

Step 2. Patient information – continued

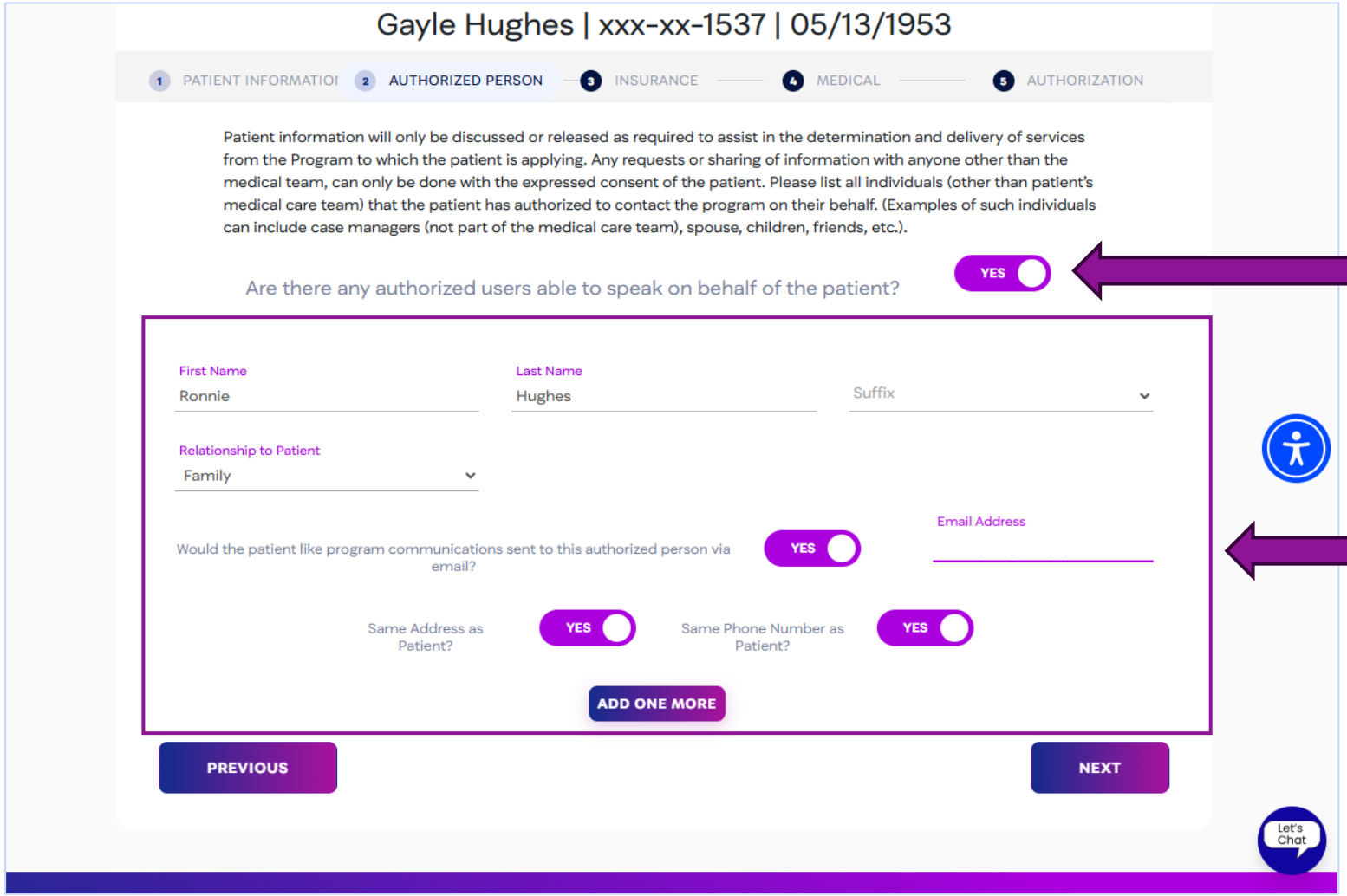


Fill out **'Applicant information'** section (information about the person creating the application).

Complete **'Referral information'** by selecting how the patient learned about the TotalAssist program from the dropdown menu, then click **'Next'.**

Applicant data is fictional.

Step 3: Authorized person



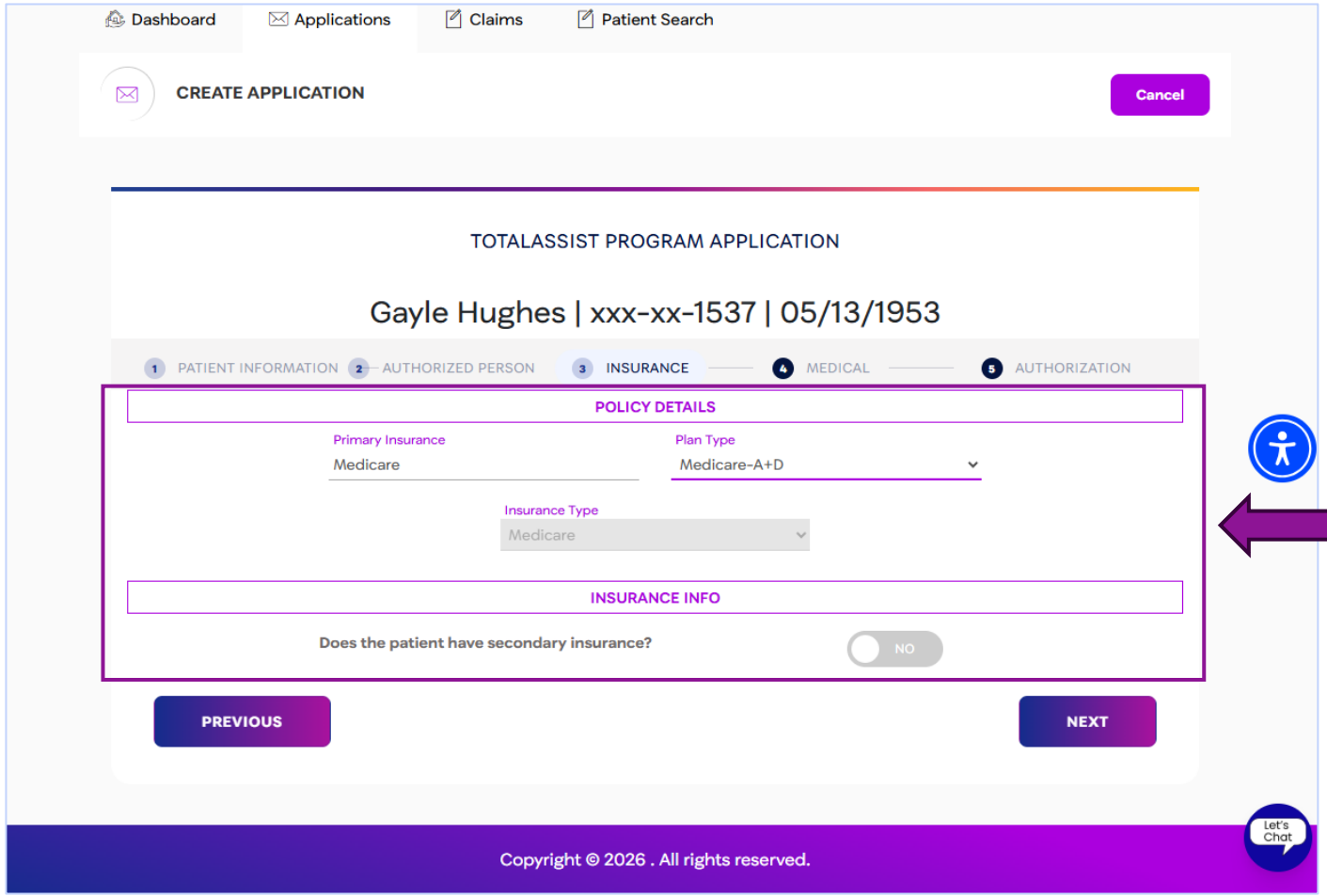
Select whether the patient has named any individuals who are authorized to speak on behalf of the patient.

If **'Yes',** complete contact information and answer required questions.

Add additional authorized persons as needed, then select **'Next'.**

Patient data is fictional.

Step 4: Insurance



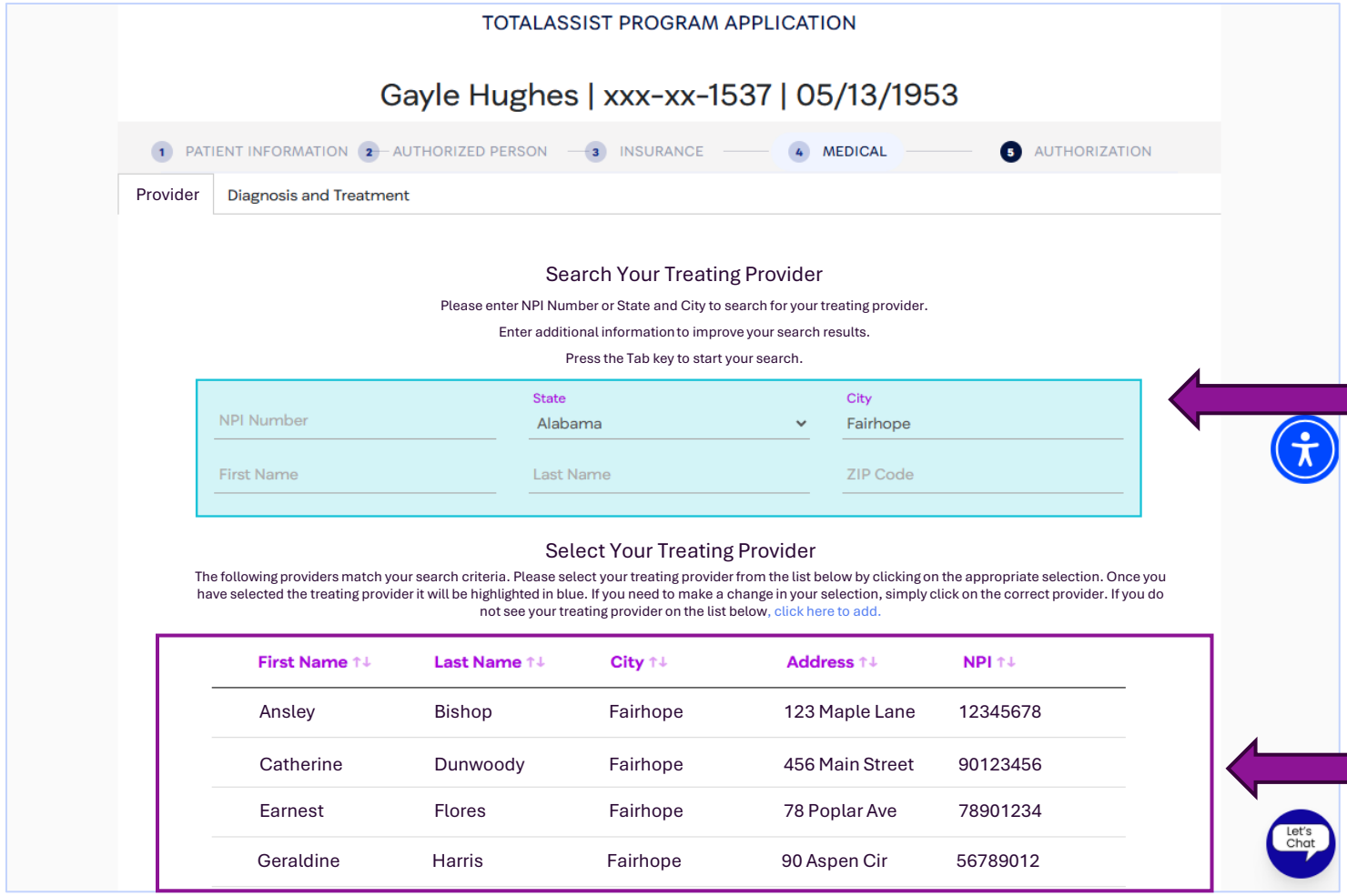
Complete section for **'Policy details'** by selecting the primary insurance carrier and plan type from the dropdown menus.

Tip: If you don't find the insurance carrier on the **'Primary insurance'** list, simply type in the insurance carrier name to proceed.

Under **'Insurance info,'** add secondary insurance if applicable, and click **'Next'**.

Patient data is fictional.

Step 5: Medical

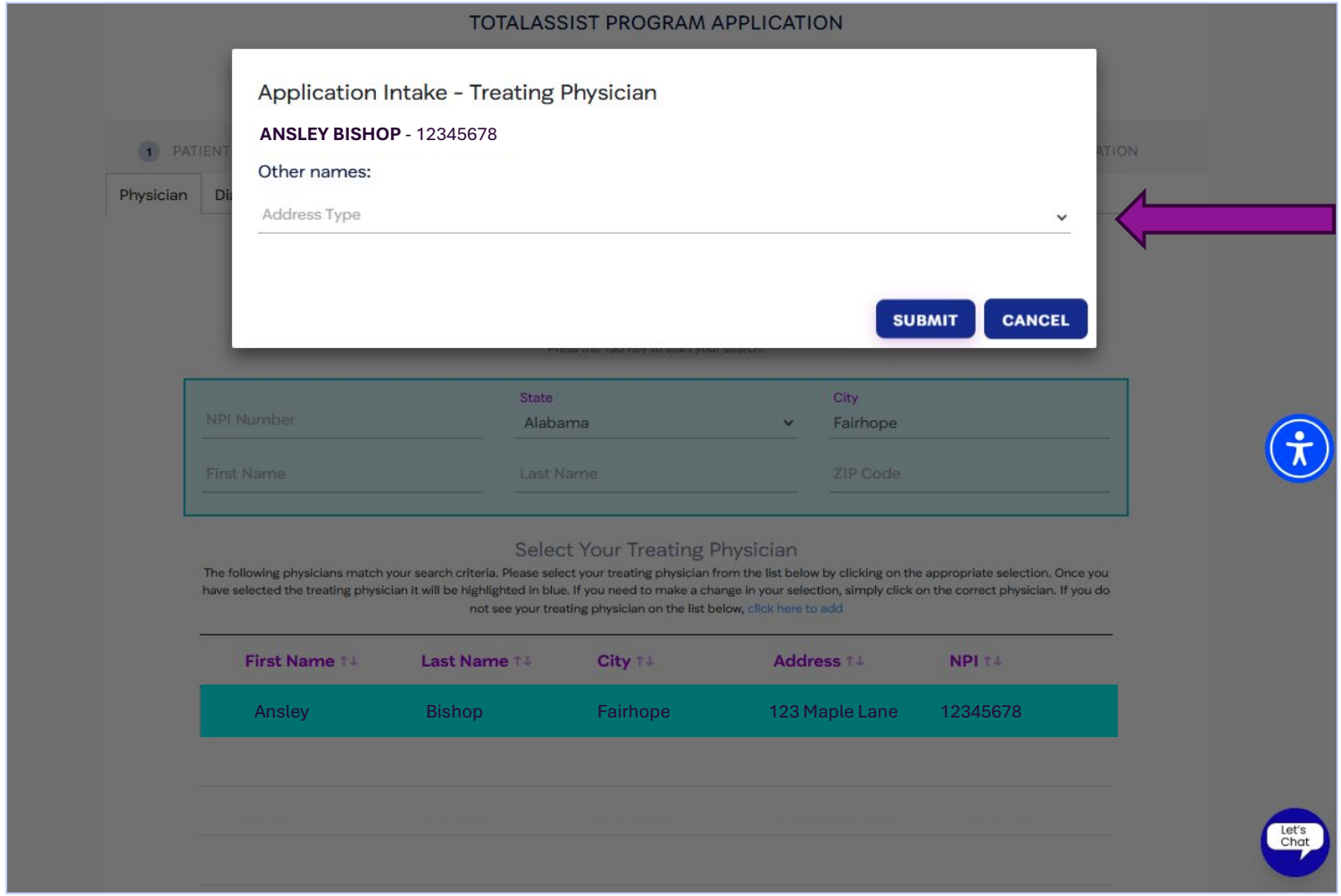


Search for your patient's treating provider by entering information into one or more of the fields in the blue box.

A list of providers matching the criteria you entered will display below. Click on the provider's name to select.

Provider data is fictional.

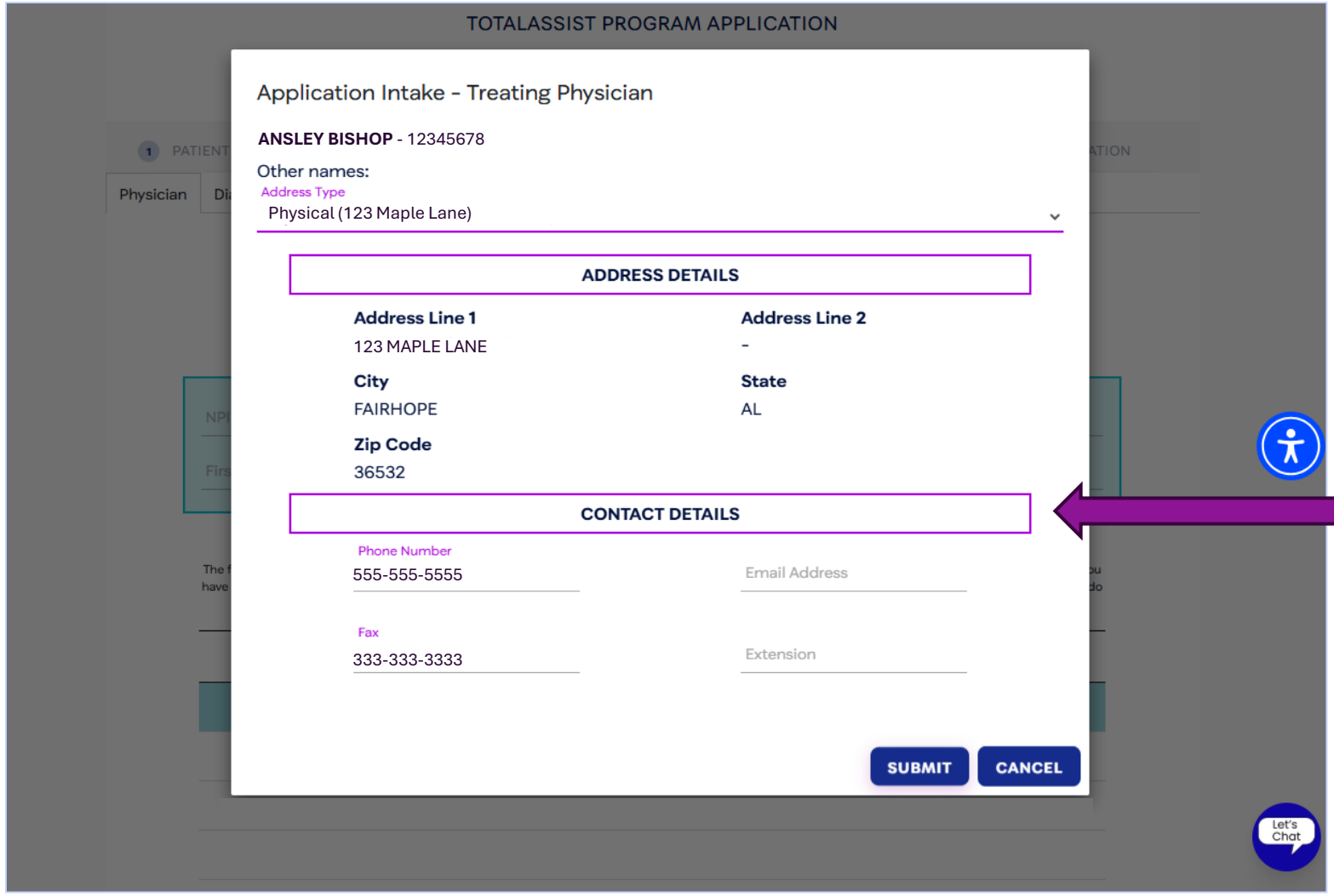
Step 5: Medical – continued



Select the address type from the dropdown and click **'Submit'**.

Provider data is fictional.

Step 5: Medical – continued



Confirm and edit the contact details as needed.

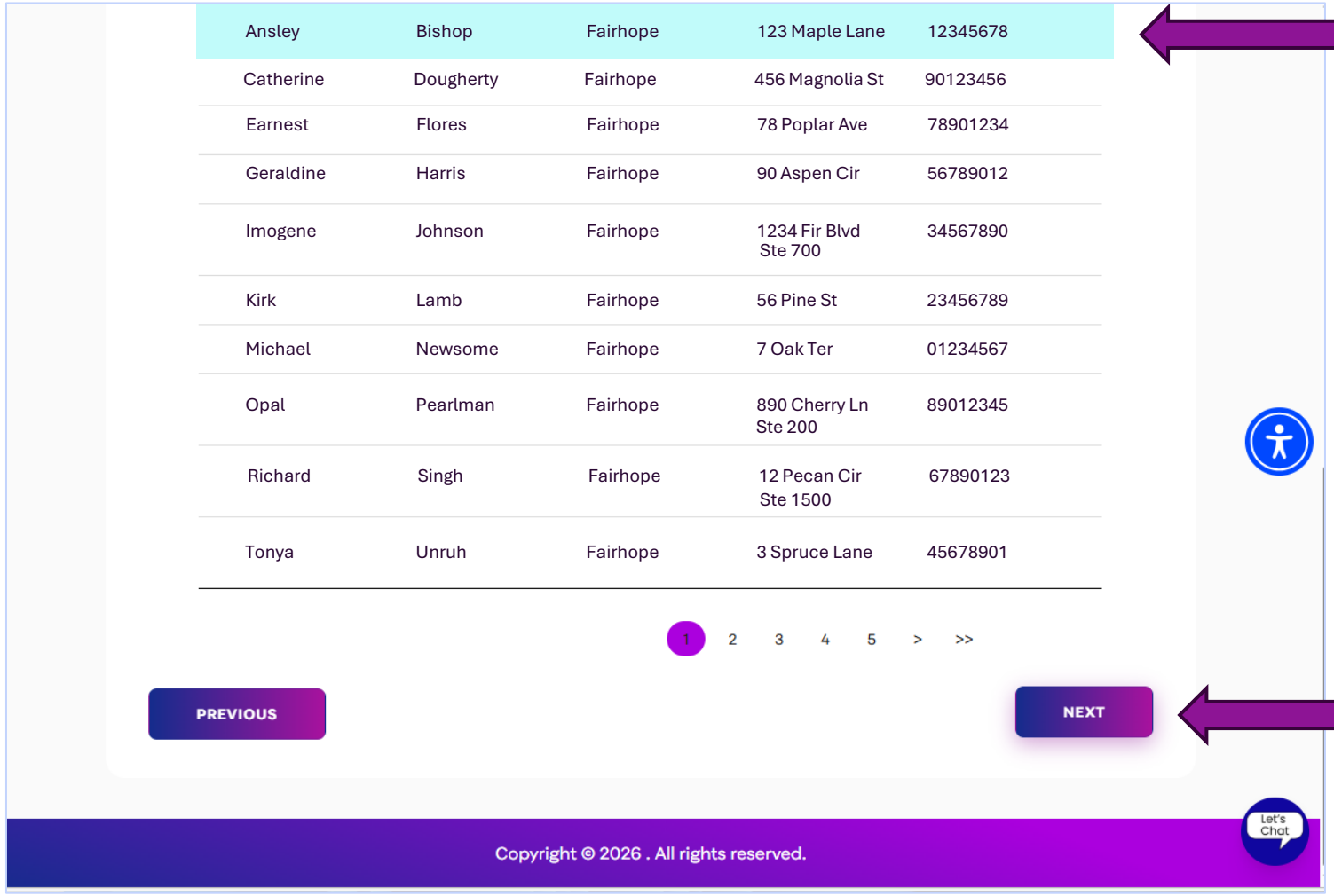
Double-check the listed fax number to ensure the information is correct. The diagnosis verification form will be sent to this number as may be needed.

When finished, click **'Submit'**.

(Note: The diagnosis verification form will not be sent to the treating provider if diagnosis is verified during the application process).

Provider data is fictional.

Step 5: Medical – continued

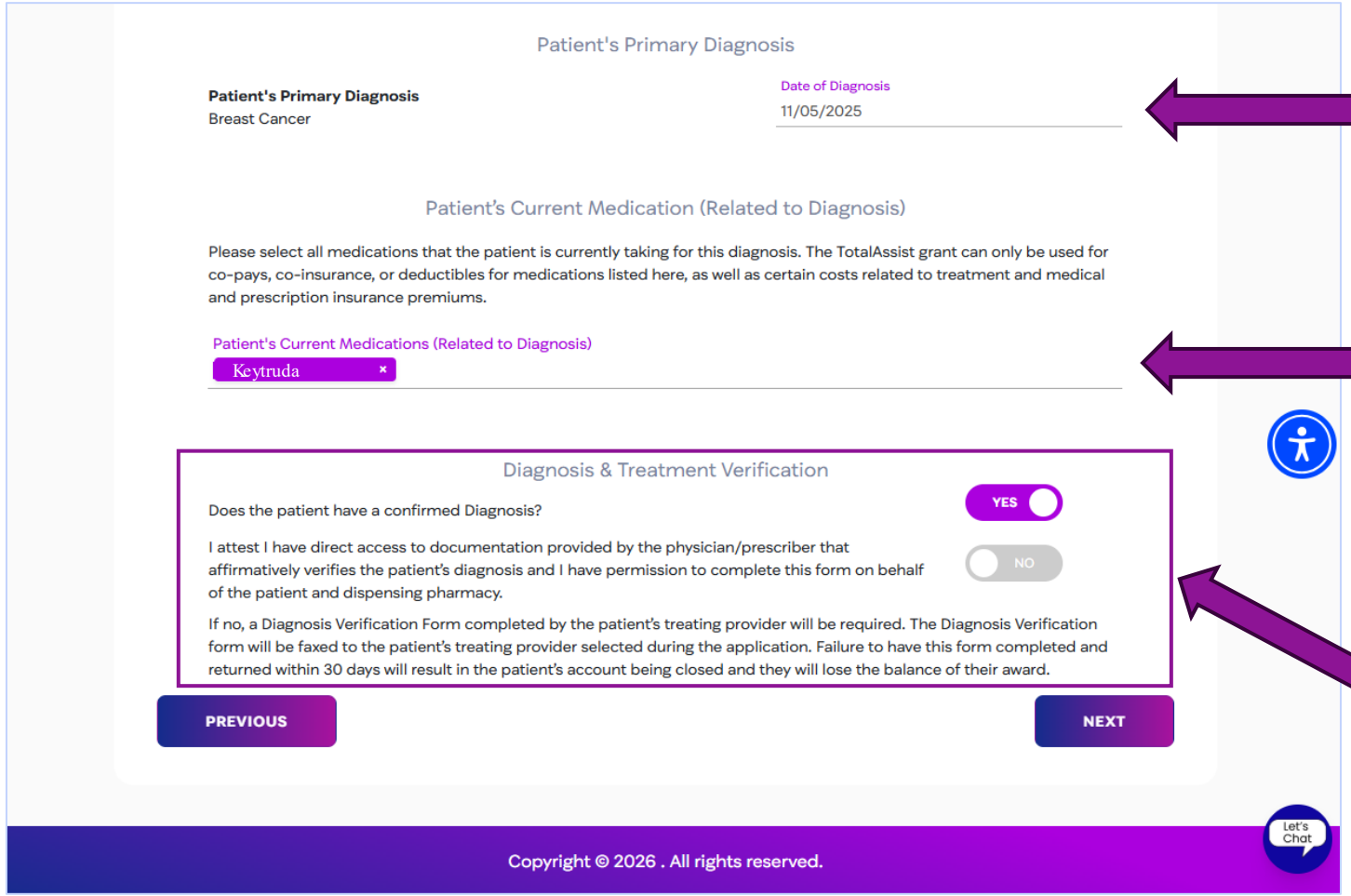


Your selection will be highlighted in blue.

After confirming contact details for the treating provider, click **'Next'**.

Provider data is fictional.

Step 5: Medical – continued



Enter the date of diagnosis.

Next, **select the medication(s)** from the dropdown the patient will be seeking assistance for.

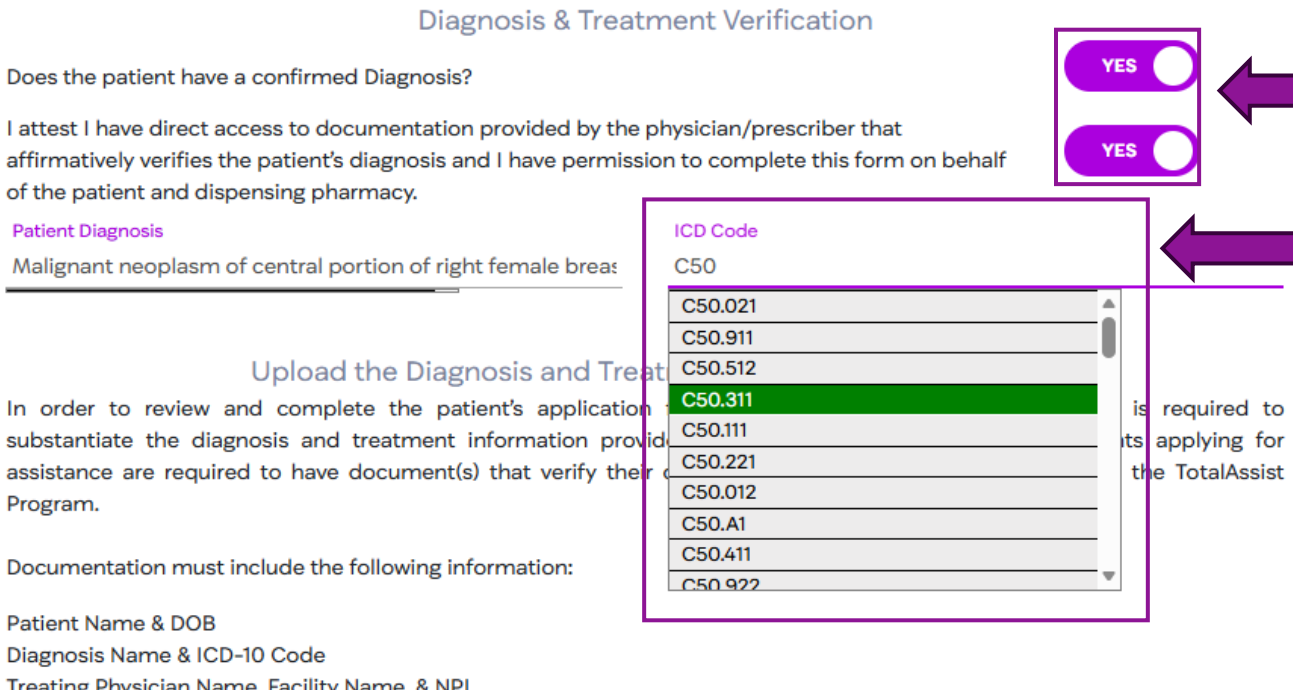
If the patient will not be using their grant for medication-related expenses, select 'Insurance'.

Finally, answer questions related to diagnosis and treatment and click **'Next'**.

NOTE: *If you select 'No' for the second question (as shown here), a Diagnosis Verification Form completed by the patient's treating provider will be required.*

Patient data is fictional.

Step 5: Medical – continued



If you <u>can</u> verify the patient's diagnosis, select **'Yes'** for both questions, and add the required ICD Code in the section below.

To select the relevant code, **begin typing directly into the field** and a list of relevant ICD codes will populate as a dropdown. Once a code is selected, the corresponding diagnosis will populate in the **'Patient diagnosis'** field.

Scroll down to upload diagnosis verification documentation.

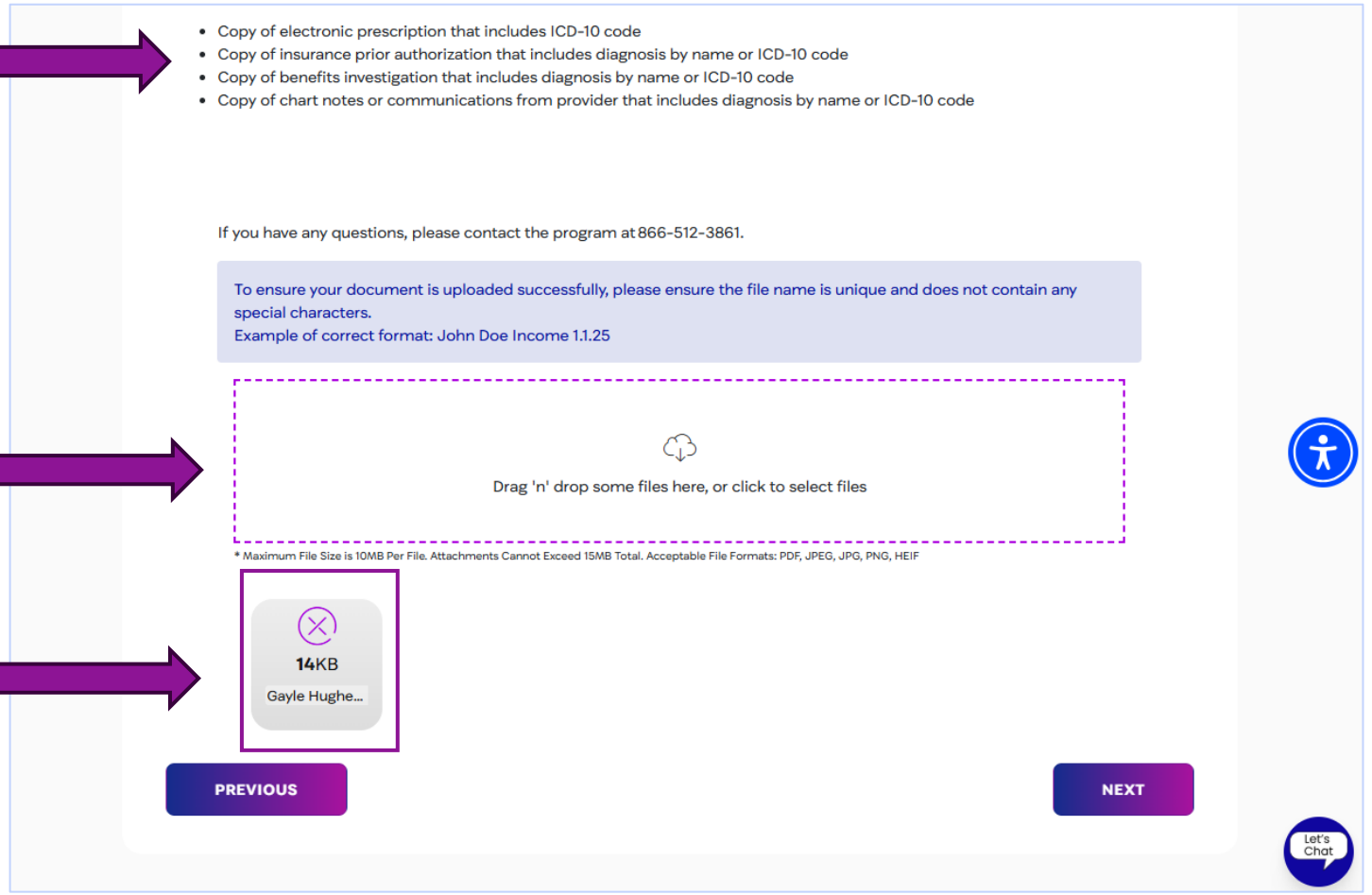
Patient data is fictional.

Step 5: Medical – continued

For **Pharmacy** portal users, a list of acceptable verification documents is listed here.

To upload documents, you can drag and drop into the outlined box or click to select files from your computer.

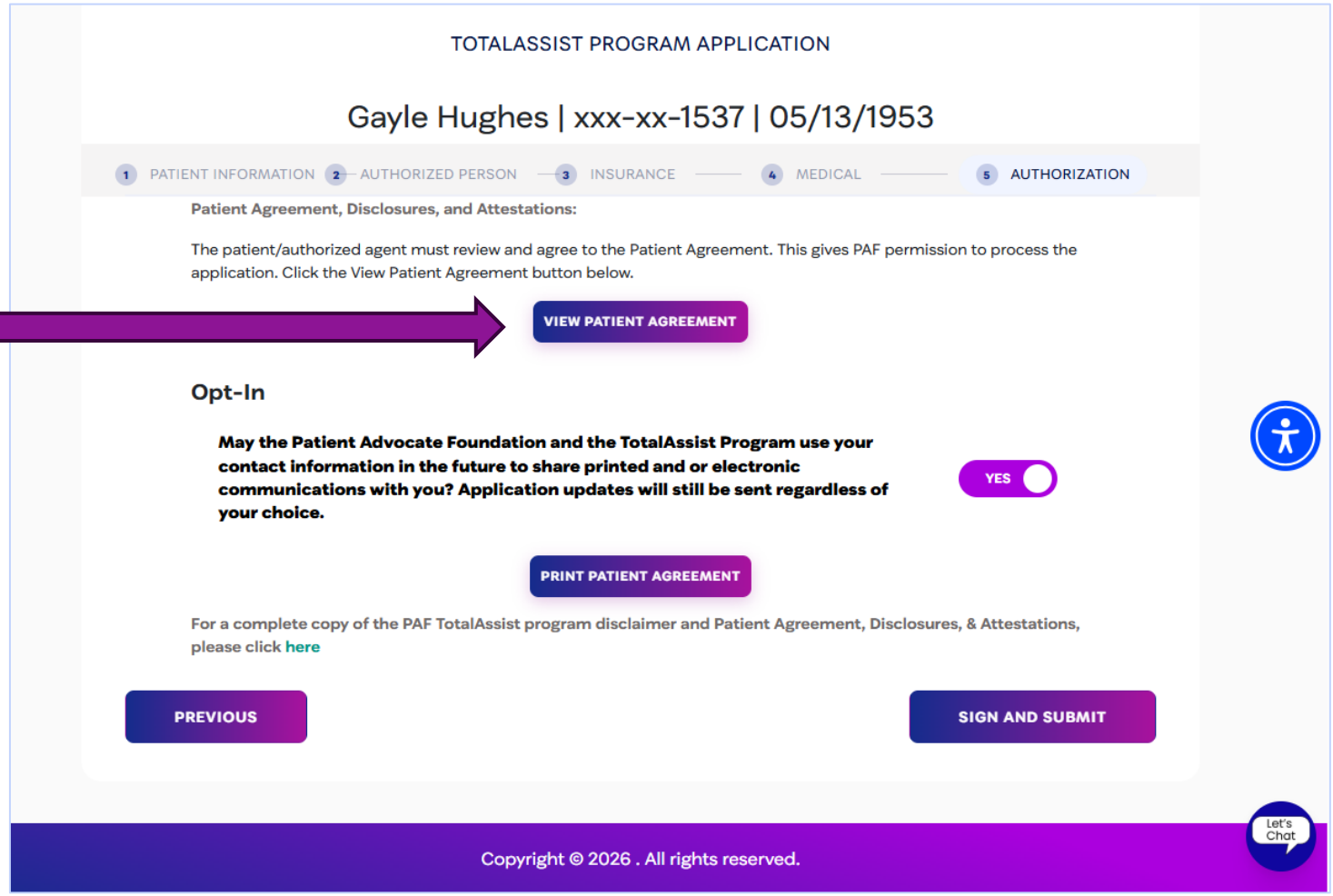
Successfully uploaded documents will display here. Once complete, click **'Next'**.



Patient data is fictional.

Step 6: Authorization

Click ‘View patient agreement’ to review and agree.

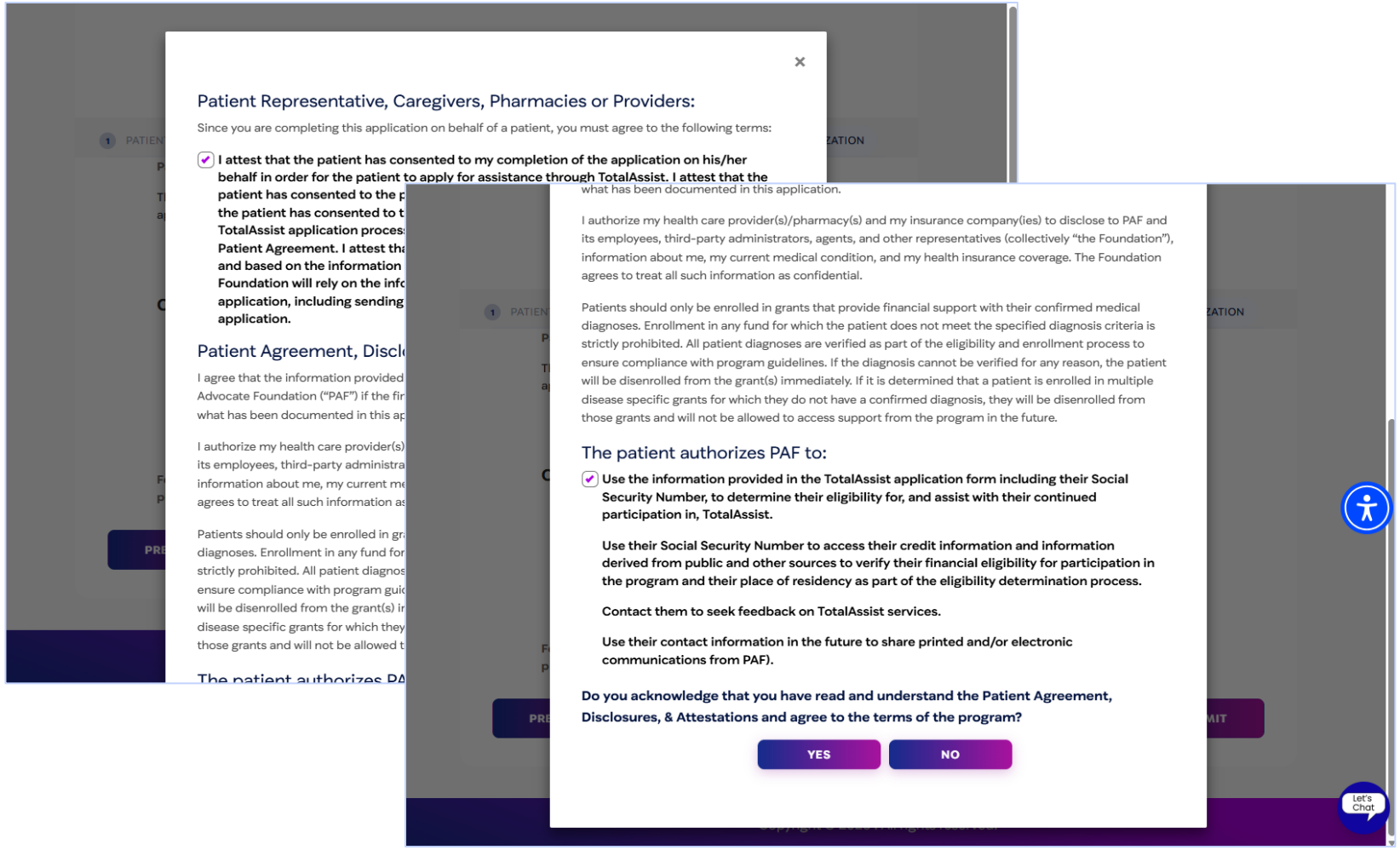


Patient data is fictional.

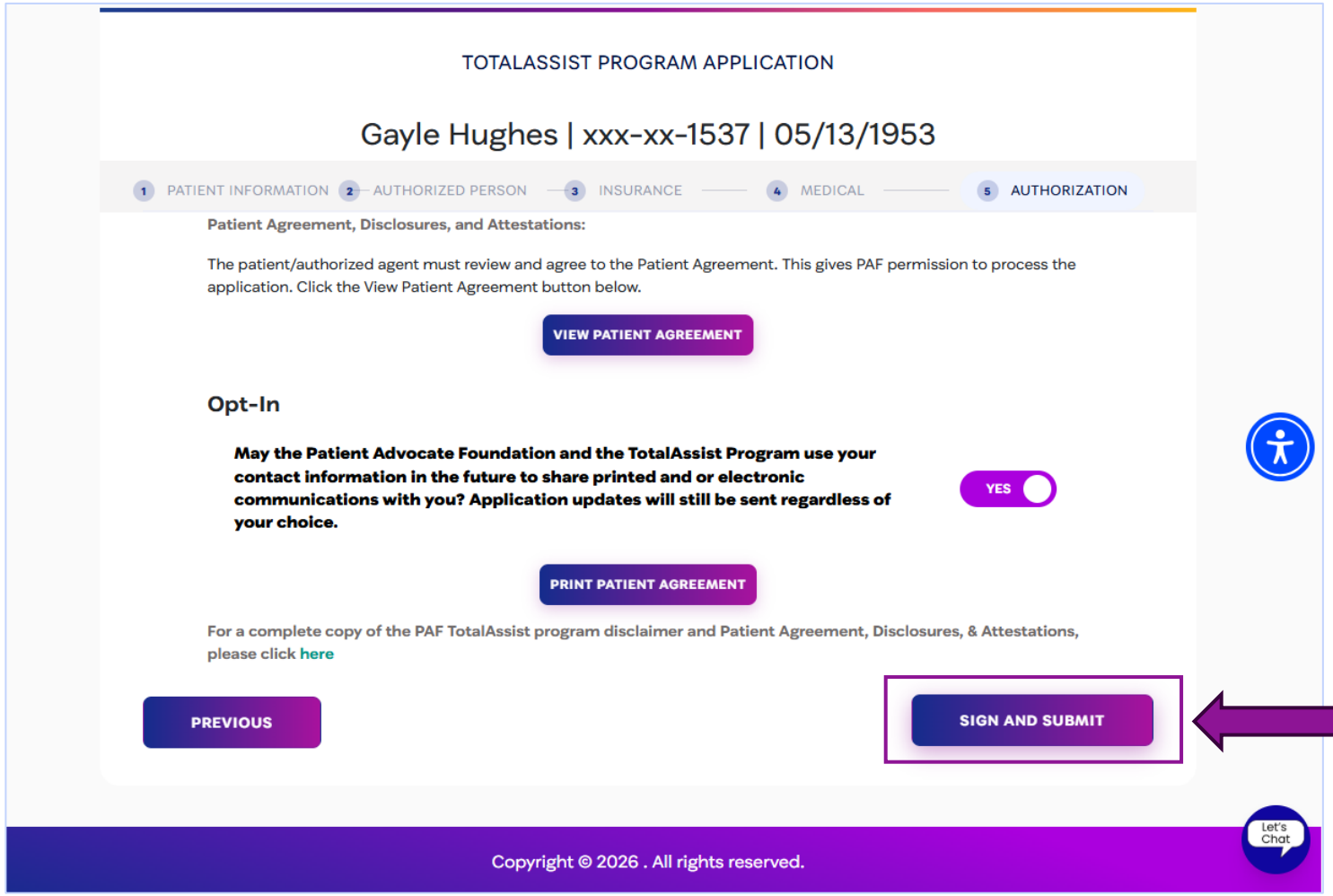
Step 6: Authorization – continued

Review the agreement, disclosures, and attestation, and **click the required check boxes.**

To complete, **select 'Yes'** to acknowledge that you have read and understand materials and agree to the terms of the program.



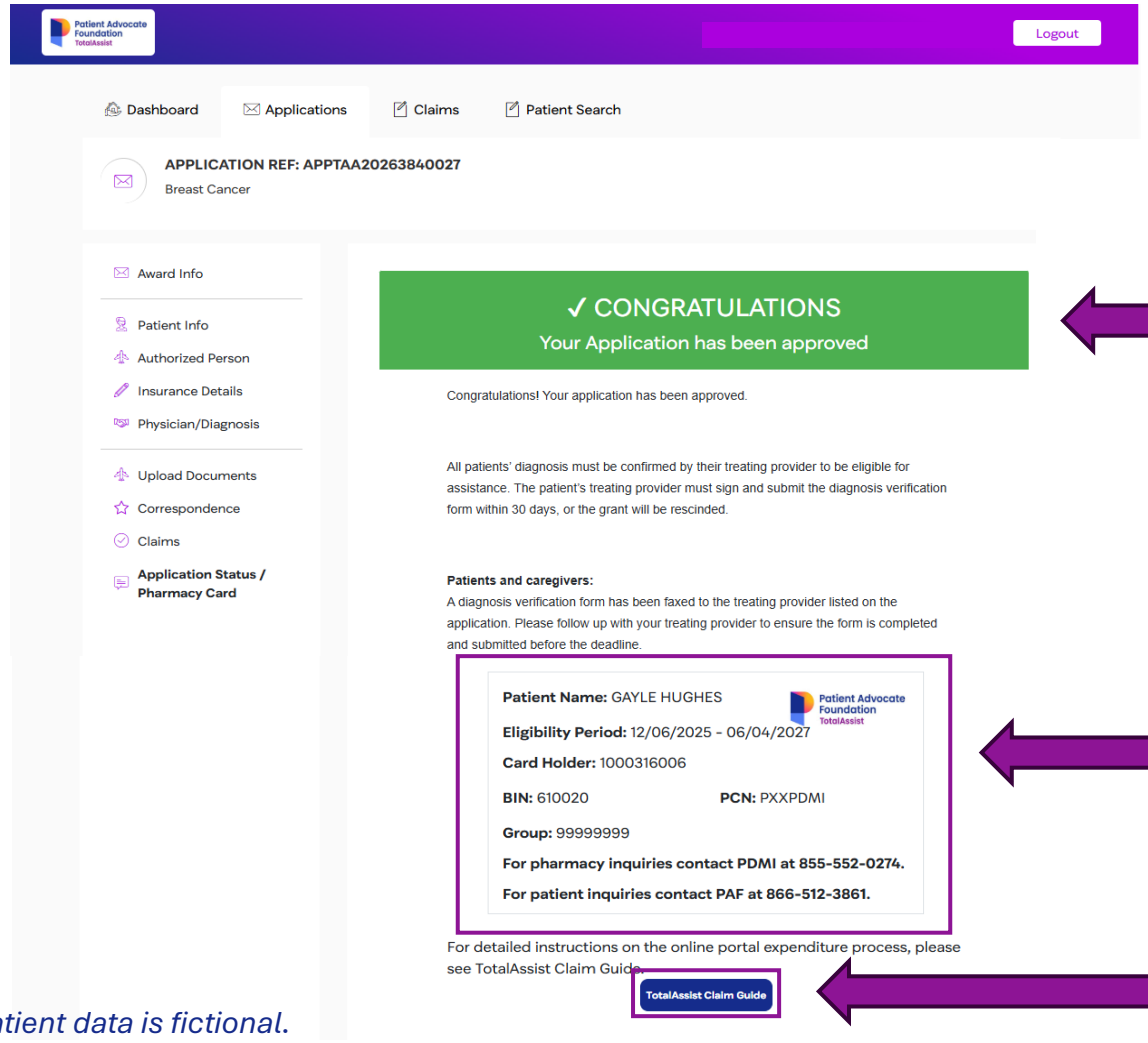
Step 6: Authorization – continued



To complete the application, click **'Sign and submit'.**

Patient data is fictional.

Application complete: Instant approval decision



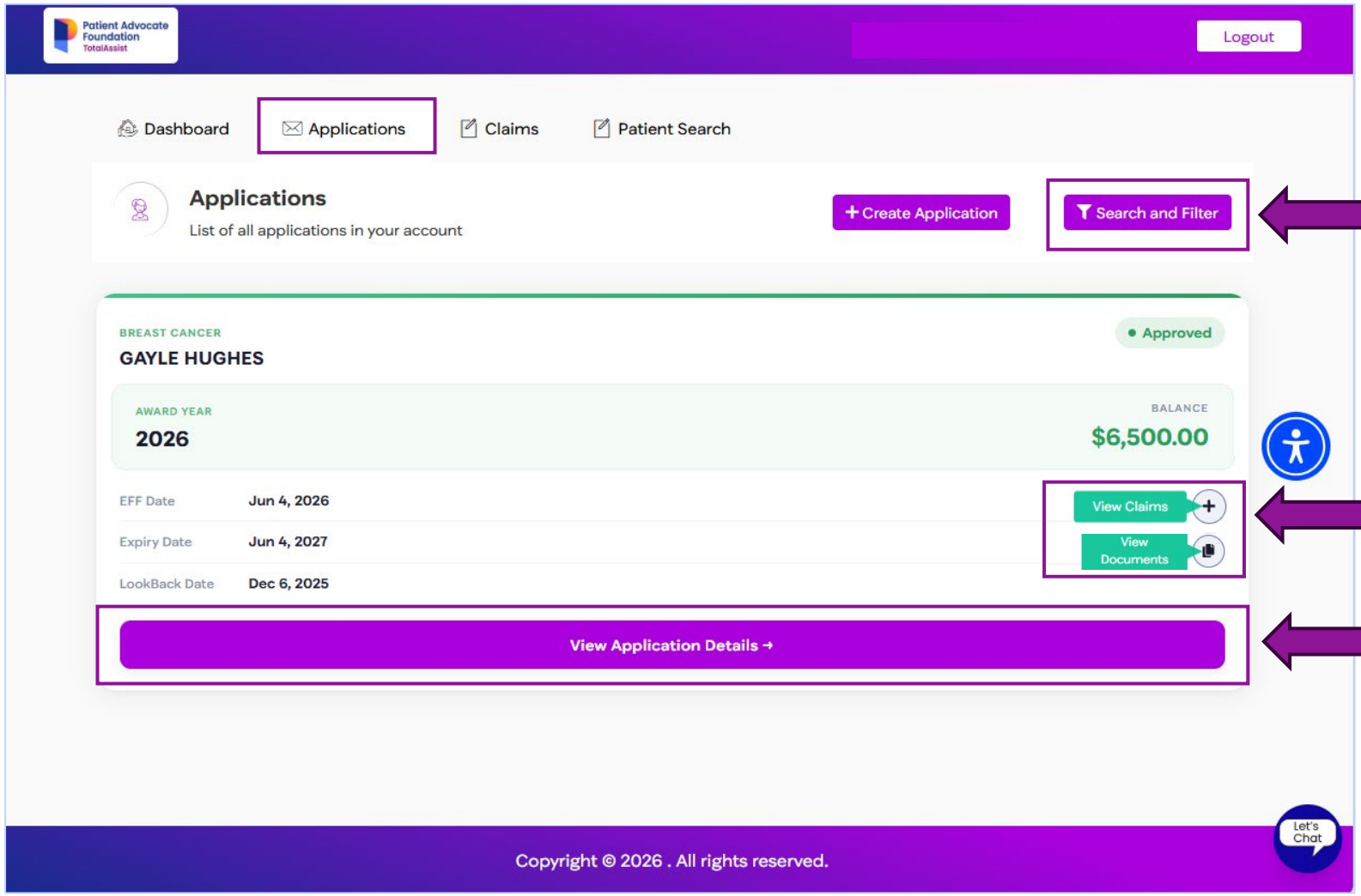
After submitting the application, you will receive an instant approval decision (in most cases).

If approved, you can scroll down to view the **virtual pharmacy card**. Patients will use this at pharmacies or specialty pharmacies.

This page also contains a link to download the **TotalAssist Claim Guide.**

Patient data is fictional.

Application information – Applications tab



Application and grant award information can always be accessed in the **'Applications'** tab of the portal.

The most recent application will be listed first, and you can use the **'Search and filter'** button to locate a particular patient.

Click these buttons to quickly view claims or documents.

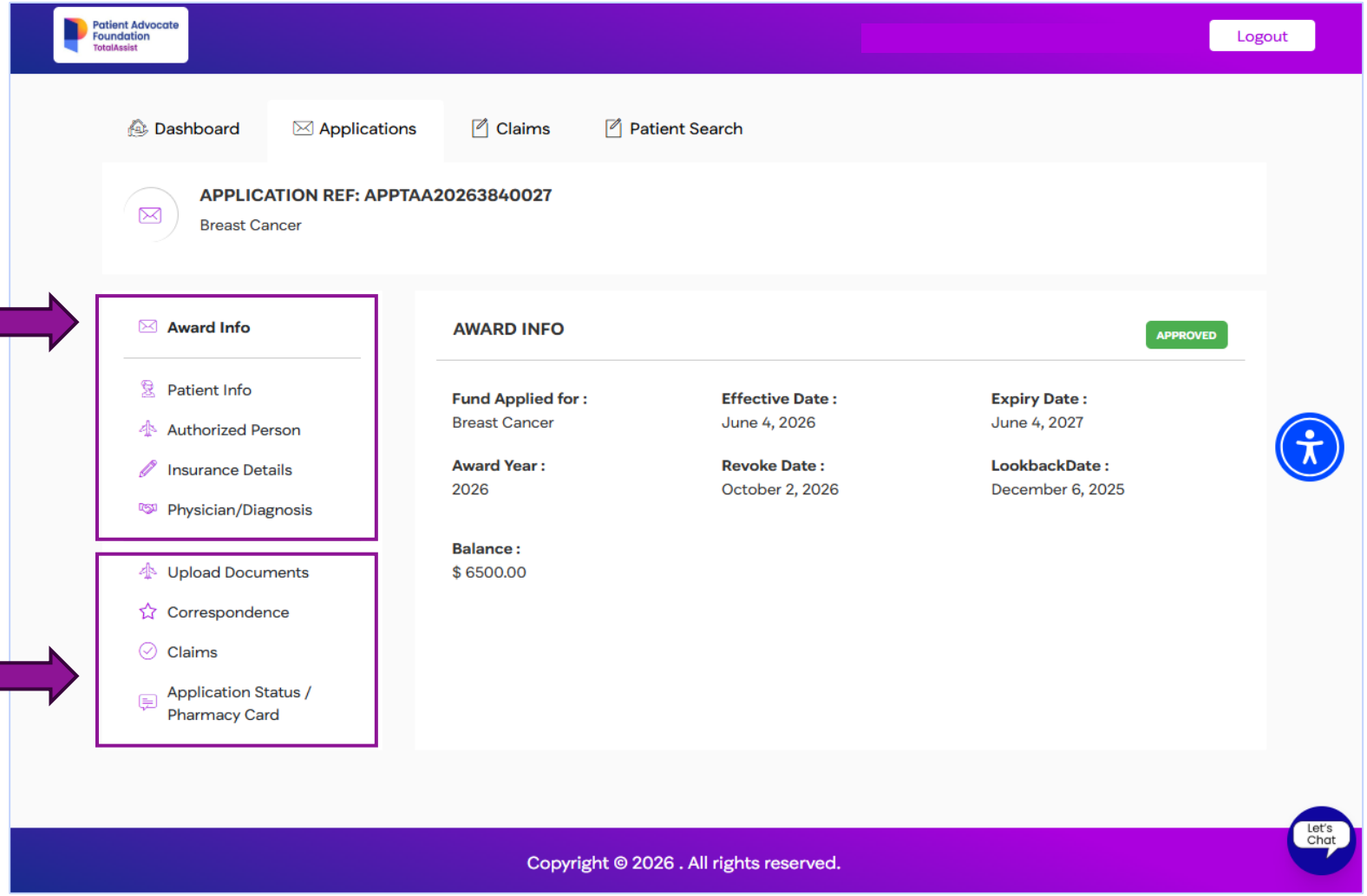
To view full application information, click **'Application details'**.

Patient data is fictional.

Application information – full details

All application information can be found here.

You can also upload documents, review correspondence, view and submit claims, and access the pharmacy card from this view.



Patient data is fictional.