

covermymeds®



USER GUIDE



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OVERVIEW

CoverMyMeds helps pharmacies and prescribers quickly find, complete and submit Prior Authorization (PA) requests for all medications through integrations with EHR systems and our free, easy-to-use portal. We facilitate electronic PA requests for Medicare, Medicaid and most commercial insurance plans.

USE COVERMYMEDS TO:

- Quickly find the correct PA request for your patient's plan
- Complete the request from your computer
- Send the request to the patient's insurance plan with the prescriber's digital signature
- Easily manage follow-up for all of your requests and patients





ACCOUNT SETUP

To access the many benefits of CoverMyMeds' electronic PA solution, start by signing up for a free account.

The screenshot shows the top navigation bar of the CoverMyMeds website. It includes a login section with 'ACCOUNT LOG IN:', 'Username' and 'Password' input fields, a 'Log in' button, and a 'TROUBLE LOGGING IN?' link. Below this is a secondary navigation bar with 'QUESTIONS: 1-866-452-5017', a 'CREATE A FREE ACCOUNT »' link (circled in red), and a 'RECEIVED A PA REQUEST? ENTER KEY »' link. The footer of the header contains the CoverMyMeds logo and a series of links: 'ABOUT', 'ePA SOLUTIONS', 'ePA SCORECARD', 'PRESS', 'HELP', 'CONTACT', and 'DEVELOPERS'.

SETTING UP AN ACCOUNT:

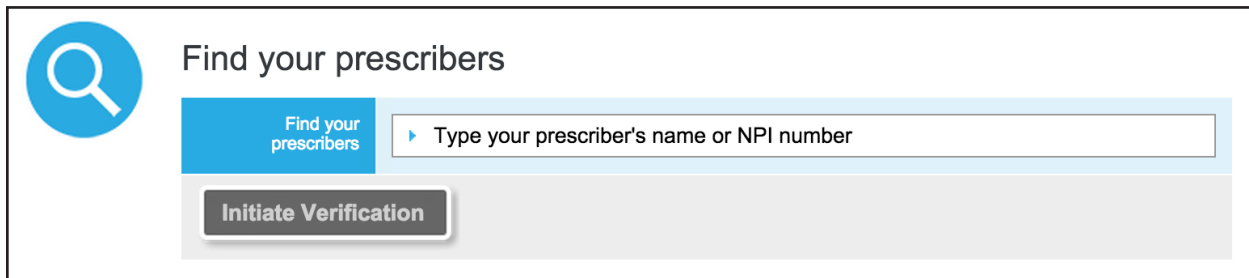
1. Open any internet browser and go to www.covermymeds.com.
2. Click on the "Create A Free Account" link at the top of the page.
3. Fill out required information. When you reach the "Prescribers" page, the sign-up is complete.

TIP:

If you already have an account, and are having trouble logging in, see page 25 for help retrieving or changing your password.

ADDING PRESCRIBERS

Verifying prescribers to your account allows you to send electronic prior authorizations (ePA) to the plans so you can receive a faster determination and quickly receive prior authorizations from the pharmacy.



The screenshot shows a user interface for finding prescribers. On the left is a blue circular icon with a white magnifying glass. To its right is the heading "Find your prescribers". Below this heading is a blue button labeled "Find your prescribers". To the right of the button is a search input field with the placeholder text "Type your prescriber's name or NPI number". Below the search field is a grey button labeled "Initiate Verification".

BENEFITS:

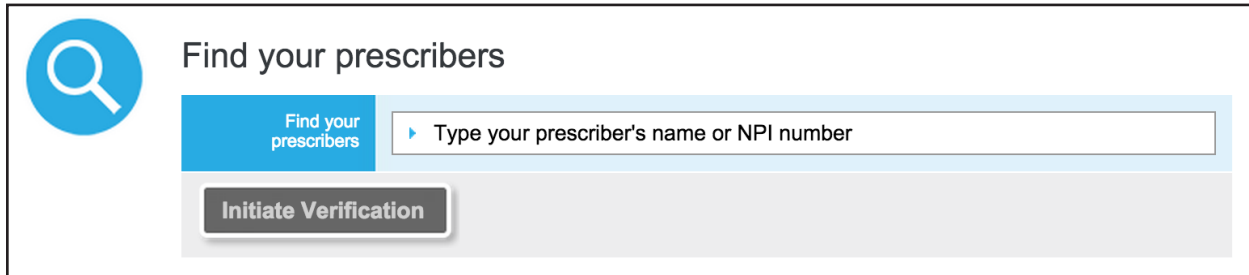
Prescriber verification is necessary for the following functions within CoverMyMeds:

- **Receiving prior authorization requests from pharmacies:** CoverMyMeds works with the largest retail pharmacy chains to enable prescribers to receive and complete PA requests electronically
- **Submitting PA requests electronically:** CoverMyMeds partners with PBMs and health plans to offer ePA functionality, which results in faster determinations. order to initiate or manage a prior authorization.

TIP:

If more than one user wishes to receive email notifications for the same prescriber, they will each need to verify that prescriber on their individual account. This must be done prior to entering a group. See page 24 for more information.

PRESCRIBER VERIFICATION



The screenshot shows a user interface for finding prescribers. On the left is a blue circular icon with a white magnifying glass. To its right is the text 'Find your prescribers'. Below this is a blue button labeled 'Find your prescribers'. To the right of the button is a search input field with the placeholder text 'Type your prescriber's name or NPI number'. Below the search field is a grey button labeled 'Initiate Verification'.

VERIFYING A PRESCRIBER:

After creating your account, you'll be prompted to verify a prescriber. Click "Prescriber" at the top of the page and follow these steps:

1. Enter the prescriber's NPI or name and select them from the drop down list.
2. You will be given a list of fax numbers, including the one the prescriber has on file with the NPI registry.
 - a. If you have access to one of the fax numbers, select it and click "Add Prescriber." Repeat this process until all prescribers have been located.
 - b. If you don't have access to the fax numbers listed, or no fax numbers are displayed, click "I don't have access to the above fax numbers." Enter the best contact phone number and additional instructions on how we can reach you.
3. Lastly, click "Initiate Verification."

CONFIRMATION:

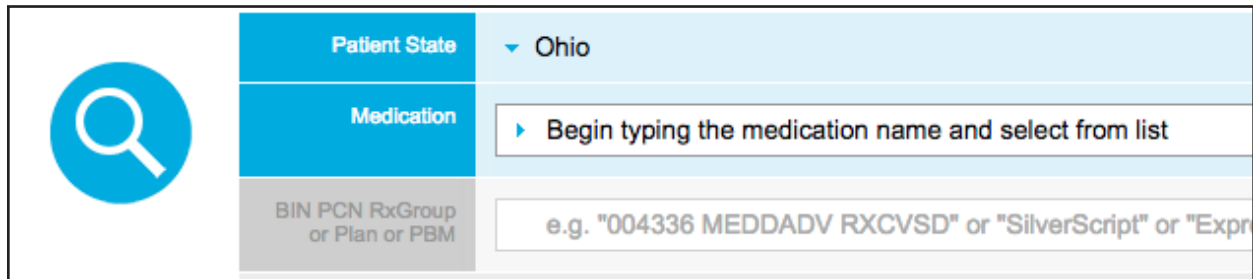
If you have access to the fax number, CoverMyMeds will send an alphanumeric code to that fax number. When you receive the verification code, go back to the prescriber screen and click the "Enter Code" button to input the verification code. From there, your prescriber will be verified.

If you don't have access to the fax number, CoverMyMeds will attempt to verify the prescriber using other sources. If we need additional information, we will contact you at the phone number you provided.

An email notification will be sent to you once this process is complete.

START A REQUEST

From your Dashboard click the “New Request” button in the left panel to navigate to the “Find the Request You Need” page.



The form has three main sections:

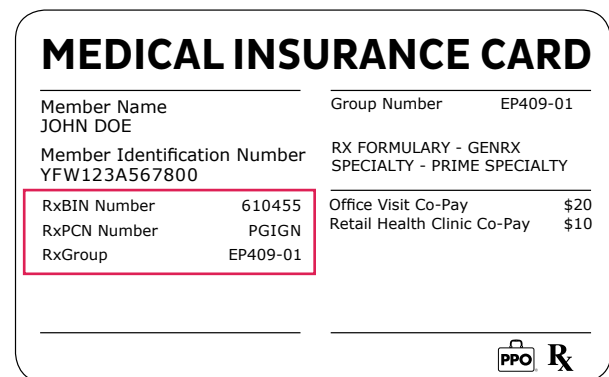
- Patient State:** A dropdown menu currently showing 'Ohio'.
- Medication:** A text input field with a magnifying glass icon on the left. Below the field is a prompt: 'Begin typing the medication name and select from list'.
- BIN PCN RxGroup or Plan or PBM:** A text input field with a prompt: 'e.g. "004336 MEDDADV RXCVSD" or "SilverScript" or "Expr'.

TO START A REQUEST:

1. Select your patient's state. The state defaults to your state. If the patient has out of state health insurance, you will need to change the state to match.
2. In the medication field, type the name of the prescribed medication and select the strength from the drop down menu.
3. In the last field, enter one of the following: health plan name, prescription benefits manager name, form name or BIN number.
4. You will be presented with the best PA request options. If you need more information before selecting your request, click “More Info.” Once you've located the request you need, click on the image of the request and click “Start Request” to begin filling out the PA.

TIP:

By searching with the RxBIN, RxPCN and RxGroup from the patient's insurance card together, it's easier to determine the exact plan.



MEDICAL INSURANCE CARD

| | |
|---|---|
| Member Name JOHN DOE | Group Number EP409-01 |
| Member Identification Number YFW123A567800 | RX FORMULARY - GENRX SPECIALTY - PRIME SPECIALTY |
| RxBIN Number 610455 | Office Visit Co-Pay \$20 |
| RxPCN Number PGIGN | Retail Health Clinic Co-Pay \$10 |
| RxGroup EP409-01 | |

At the bottom right, there is a logo for 'PPO' and a stylized 'R' symbol.

TAGS

CoverMyMeds adds “Required” and “Important” tags to the plans’ requests to ensure the request is completed. Completing all the questions, especially the ones with tags, will help the plan come to an appropriate determination.

| | | |
|-------------------------------|---|-----------|
| Date of Birth (mm/dd/yyyy) | <input type="text"/> | Required |
| Patient ID # | <input type="text"/> | Important |
| Phone # | <input type="text"/> | |
| Your Identifier (optional) | e.g., medical record # or billing # or Rx # or your 3 initials. <input type="text"/> | |

REQUIRED TAGS:

Required tags indicate fields used by the plan or another healthcare provider to identify the patient. These fields are required to share the request with another healthcare professional, or to send the request to the plan for review.

IMPORTANT TAGS:

Important tags indicate fields most commonly used by the plan to make an accurate determination. We highly recommend completing these fields before sending the request to the plan.

TIP:

To assist in the determination process, complete as much information as possible, including fields not marked with “Required” or “Important” tags.

ADDRESS BOOKS

In CoverMyMeds, address books are used to store patient, prescriber and pharmacy information for future PA requests. All entries are automatically saved in your address book. Simply enter information in the appropriate fields and click “Save” in the left panel.

| Patient Details | |
|---|---|
| Do you mean: John Doe? Clear | |
| John Doe | |
| First & Last Name | <div>First: John</div> <div>Last: Doe</div> |
| ID# | |
| Group # | |

STORING MULTIPLE ENTRIES:

1. Begin typing the contact's information in the provided fields and click “Save” on the left panel.
2. Click “Clear” on the right side of the gray address book bar and start typing information for the next contact.
3. Repeat this process until you've added all desired entries.

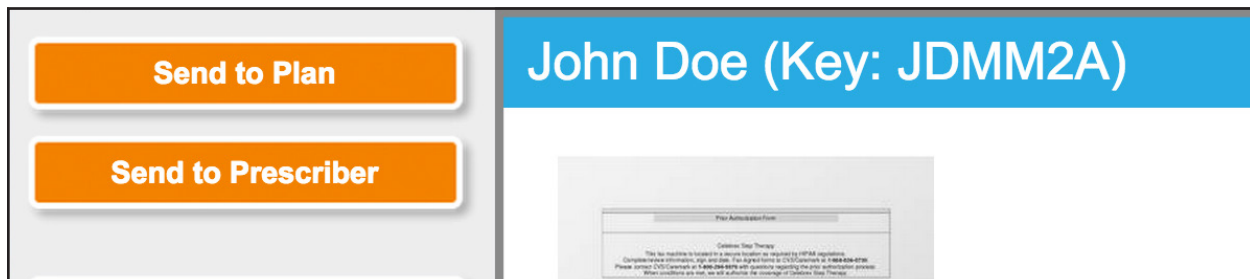
RETRIEVING A STORED ENTRY:

1. Begin typing in the first name field. The address book will change to “Do you mean:” and list entries matching the name entered.
2. To select the entry displayed, click the name displayed in the address bar and then select it from the drop down menu. Click “Clear” to search for another entry.

You can also retrieve a full list of entries by leaving the fields blank and clicking the gray address book bar.

SEND A REQUEST

Once the PA request is complete, you can send it to a plan. Requests can also be sent to the prescribing physician or another healthcare professional for completion.



SEND TO PLAN

Click the “Send to Plan” button in the left panel.

Electronic: For plans that have switched to a fully-electronic process, you will receive a pop-up box confirming the prior authorization has been sent.

Classic: For plans that have not yet switched to an electronic process, you will be given a preview image of the form you completed. For most requests, the plan’s fax number will auto-populate, as well as your own contact information.

If any fields are blank, be sure to enter the appropriate information.

SEND TO PRESCRIBER

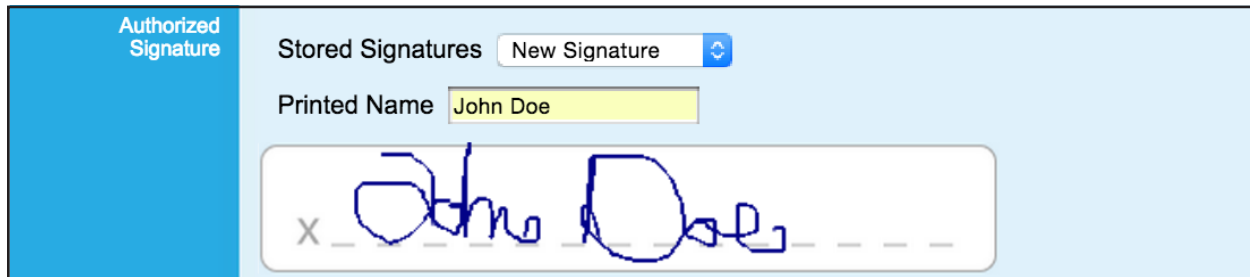
After creating a new prior authorization request or opening an existing request, enter the patient’s first and last name as well as their date of birth. Click “Send to Prescriber” on the left panel.

Email: For prescribers with a CoverMyMeds account, select “Email” and enter the prescriber’s email address to share the request directly with their CoverMyMeds account.

Fax: For prescribers who do not have a CoverMyMeds account, click “Send to Prescriber” on the left panel and select “Fax.”

Complete any empty fields on the fax screen and edit the Message text box if needed, then click Fax. You can also view or print the fax by clicking Preview.

SEND A REQUEST



SIGNATURES:

Some PA requests require an authorized signature before they can be sent to the plan. This can be completed electronically through CoverMyMeds.

From the “Send Request to Plan” screen, type your name in the “Printed Name” field. Then, sign the request on the dotted line by holding down the left mouse button and moving the cursor like a pen to form a signature. You may click “Reset” and re-sign until you are content with the signature.

TIP:

CoverMyMeds automatically stores the signature after the request is sent. It will be available in your stored signatures the next time you send a request.

CONFIRMATION:

After confirming the office contact information and applying the signature (if needed), click the “Fax” button at the bottom of the page.

Once a prior authorization request has been successfully sent to the plan, they will contact you directly with their determination, usually by fax. On average, it takes 1 to 5 business days to reach a determination.

KEYS

When a request needs to be shared with another healthcare provider through CoverMyMeds, a Key is sent to share access. The Key is a unique, alphanumeric code attached to each request created in CoverMyMeds. Keys can be entered by users with or without a CoverMyMeds account.



The screenshot shows a web interface for a healthcare provider. On the left, there are buttons labeled "Send to Plan", "Prescriber", and "Save". The main area displays a patient record for "John Doe (Key: JDMM2A)". The text "John Doe (Key: JDMM2A)" is circled in red. Below this, there is a dropdown menu labeled "Patient" and a search bar with the text "Do you mean: John Doe?" and a "Clear" button. At the bottom, there is a form with fields for "Name" (Prefix, First, Middle, Last, Suffix) and "Suffix". The "First" field contains "John" and the "Last" field contains "Doe".

SHARING A REQUEST:

If a request needs to be shared with another healthcare professional, open the request from your Dashboard and click "Send to Prescriber." From the dropdown, you'll choose fax or email.


Email: Enter the email address on the recipient's CoverMyMeds account and click "Send." This will share the request with the user's account and send them an email notification.

Fax: If you select fax, confirm the fax number and click "Fax." This will send a coversheet letting the recipient know a prior authorization is needed and how to access the request online. It will also send the required information to access the request, including the CoverMyMeds key.

TIP:

Requests cannot be accessed by another healthcare professional unless they have the required information.

KEYS

| | | |
|---|--------------------------------------|----------------------|
|  | Key | <input type="text"/> |
| | Patient's last name | <input type="text"/> |
| | Patient's Date of Birth (mm/dd/yyyy) | <input type="text"/> |

USING A KEY:

If you received a Key from a pharmacy or another healthcare professional, use the following steps to access the request:

1. Go to covermymeds.com
 - CoverMyMeds Users: Log in to your account and click “Enter Key” on the left panel.
 - Non-CoverMyMeds Users: Click the “Enter Key” link below the log in section at the top of the page.
2. Enter the Key, patient’s last name, and patient’s date of birth.
3. Click “Enter Key.”

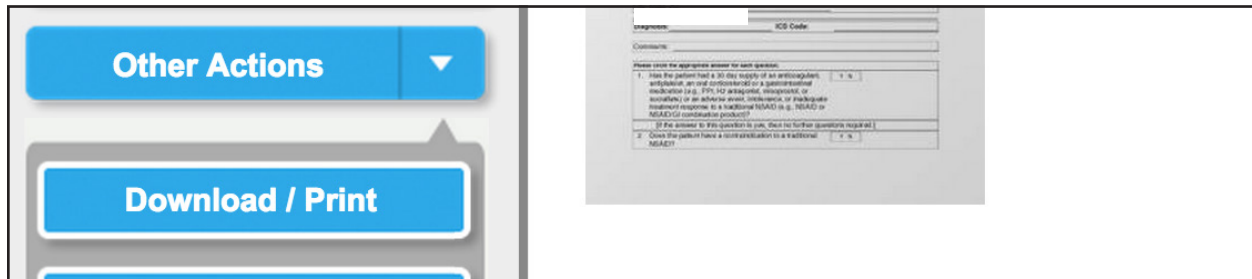
For CoverMyMeds users, once you’ve logged into your account and entered a Key, the request will be linked to your account and accessible from your dashboard.

TIP:

Pharmacies only need to provide the patient name and date of birth to print or share the request with the prescriber.

DOWNLOAD OR PRINT A REQUEST

If a physical copy of a PA request is needed, it can be downloaded and printed for many plans.



On your Dashboard, click “Open” on the request you would like to download or print.

1. Click “Other Actions” in the left panel and then click “Download / Print.”
2. A pop-up box will appear asking if you would like to include a patient instruction sheet. If you would like to include it, check the box. (For more information, see following page.)
3. Click “Download Only” if printing for a patient’s records or “Download and Mark as Sent to Plan” if you would like to print the request and manually fax it to the plan.

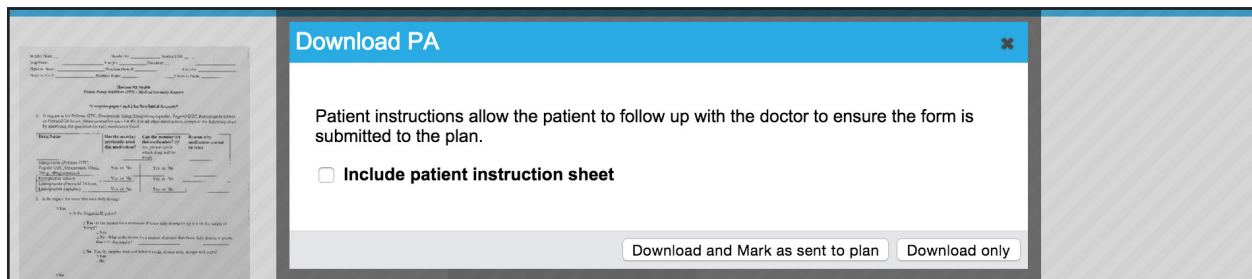
The phone and fax number for the plan are located on the page next to the form image. The file will open as a PDF you can view and print.

TIP:

For plans that have switched to a completely electronic process, a paper form will not be available; however, you can still print out the questions and any information you’ve entered for the patient’s records through the “Download / Print” button.

PATIENT FOLLOW-UP INSTRUCTIONS

Pharmacies can print patient instructions that allow the patient to follow up with the prescriber to ensure the request is submitted to the plan.



TO PRINT A PATIENT INSTRUCTION SHEET:

1. Open an existing request or create a new request and enter the patient's first and last name, as well as their date of birth. Add other details as available.
2. Share the request by clicking "Send to Prescriber" or "Download / Print."
 - **Send to Prescriber (for new requests):** After clicking "Send to Prescriber" and choosing "Fax" as the method, check the box that says, "Fax me instructions to give to the patient." Click "Fax" to send yourself an instruction sheet to give the patient.
 - **Download / Print (for existing requests):** Check the box marked "Include patient instruction sheet," then, click "Download only" or "Download and Mark as sent to plan." Open the PDF and print the form with the instruction sheet.

TIP:

The Patient Instruction sheet is only available for pharmacies to print and provide to patients.

RENEW A REQUEST

The renew feature allows you to quickly create new PA requests using imported information from existing requests. Easily renew PA requests with the click of a button. The renew feature allows you to renew any PA from your account and import the previous information into a new request.

The screenshot shows a user interface for renewing a request. It features a confirmation bar at the top with a blue button labeled "Do you mean: John Doe?" and a "Clear" button. To the right of this bar is a blue box containing a checkbox and the text "I have reviewed and updated this section". Below the confirmation bar is a light blue section with three input fields labeled "Middle", "Last", and "Suffix". The "Last" field is populated with the name "Doe".

TO RENEW A REQUEST:

1. Open an existing request and click "Other Actions" in the left panel. Then select "Renew." For archived requests, open the existing request and click "Renew" in the left panel.
2. A pop-up box will appear with information from the previously submitted request. Confirm the same drug dosage, prescription insurance coverage, and patient still reflect the information you need to create your renewal.
3. When you are ready to renew the PA, click "Create Renewal."
4. A new request will be generated and populated with previous information. You will be required to review each section of the request and verify all patient, prescriber and medical information is accurate. Do this by clicking the blue confirmation boxes along the right side of the screen. All boxes must be checked before a renewed prior authorization can be submitted to the plan. Once each box has been checked, click "Send to Plan" in the left panel and submit as usual.

NOTES AND REMINDERS

Notes and Reminders help you manage and track the activity of a PA. The system automatically records Notes for events like sending and sharing a request. You will also be able to find fax statuses and confirmations in the Notes section.

The screenshot displays the CoverMyMeds interface. On the left, a 'Notes' panel shows a list of recent activities: 'Today, 5 minutes, 27 seconds ago' with 'Converted by You', 'Today, 5 minutes, 31 seconds ago' with 'Viewed by You', and 'Yesterday, 6:37 pm'. On the right, the 'Patient Details' section is visible, featuring a 'Patient address book' dropdown and input fields for 'First & Last Name' (First: John, Last: Doe), 'ID#', and 'Group #'.

ACCESSING NOTES:

1. On your Dashboard, click "Open" on the request you would like to view.
2. Click the "Notes" tab in the left panel.
3. View the request history, including date, time, and action taken.
4. Click "All" at the bottom of the notes section to find and print a fax confirmation sheet and view fax transmission statuses.
5. Add your own notes by entering information in the text field at the bottom of the left panel and clicking "Add."

ADDING REMINDERS:

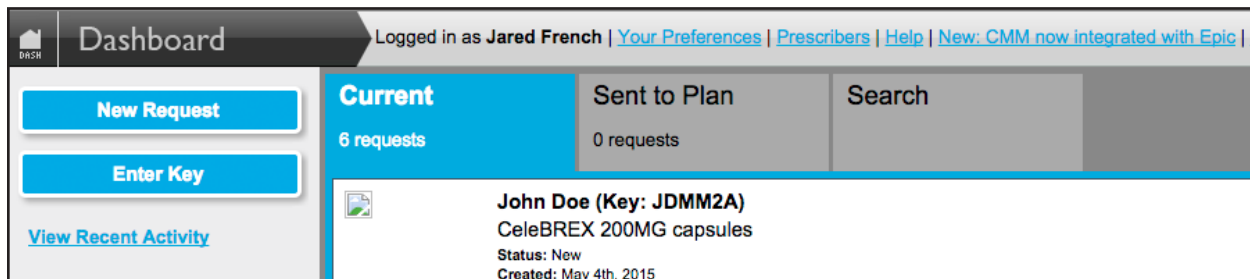
1. On your Dashboard, click "Open" on the request you would like to view.
2. Click in the text block at the bottom of the left panel underneath the Notes section.
3. Enter information for follow up.
4. Check "Set reminder" and use the drop down to choose a date.
5. Click "Add."

You will be prompted to add a reminder after sending a request.

To be emailed about overdue reminders, click "Your Preferences" at the top of the screen and select Yes to "Do you want to be emailed about overdue reminders?"

DASHBOARD

All PA requests created in CoverMyMeds are stored on the Dashboard. The Dashboard can be located by clicking the house icon in the upper left corner of your screen.



From the Dashboard you can view requests, start a new request, enter a Key and view recent activity.

You can navigate to your Dashboard from any page by clicking the house icon in the upper left panel.

DASHBOARD TABS:

1. **Current:** Contains requests that have not been sent to the plan.
2. **Sent to Plan:** Contains requests that have been sent to the plan and are awaiting a determination.
3. **Search:** Search for open and/or archived requests, by the patient's last name, drug, people sharing or your identifier.

TIP:

The "Mark as Sent to Plan" button that appears on the prior authorizations on your Dashboard will not send the PA to the plan. This simply moves the PA to the "Sent to Plan" tab to reflect you have manually faxed it.

SHARED AND RECEIVED INDICATORS

Whenever a request is shared to your account, one of two indicators will appear next to it on your Dashboard.

| | | |
|--|---|---------------------------------|
| | John Doe (Key: XYLGFF) NexIUM 10MG packets Status: Shared Created: May 6th, 2015 Open Mark as sent to plan Archive | SHARED <input type="checkbox"/> |
| | Amber Harner (Key: T9FYJY) Dexilant 60MG delayed release capsules Status: Shared \ Accessed Online | RECEIVED |

SHARED INDICATOR:

The Shared indicator indicates you have either faxed or emailed a request to another healthcare professional.

If the box next to “Shared” is empty, it means it hasn’t been accessed by the recipient through CoverMyMeds. If it is checked, it means they have accessed the request.

RECEIVED INDICATOR:

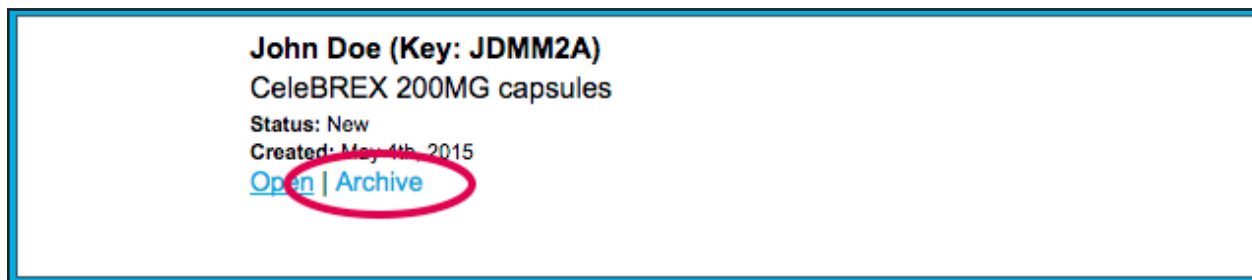
The received tag indicates you’ve received a request from a pharmacy or other healthcare professional. PAs marked with this indicator were not started by you, but were sent to you for completion.

TIP:

Once the request is sent to the plan, the “Shared” and “Received” indicators will be removed.

USING ARCHIVE AND NOTIFY

Prescribers should Archive requests when the plan has sent notification of the determination. Pharmacies should Archive requests when the prescriber has sent notification of the determination or when the related claim has been successfully adjudicated.



ARCHIVE OPTION 1:

1. Go to your Dashboard and find the request you want to archive.
2. Click the “Archive” link.

ARCHIVE OPTION 2:

1. Open an existing request.
2. Click “Archive” in the left panel.


CHOOSING AN OUTCOME:

Choose an outcome of “Approved,” “Denied,” “Not sent to plan,” or “Don’t know outcome.”

- If “Denied” is chosen, a dropdown menu will appear. Select the reason for the denial. If the given reasons are insufficient, you may type the reason in the “Other” field.
- If “Not sent to plan” is chosen, a dropdown menu will also appear. Select the appropriate reason from the menu.

USING ARCHIVE AND NOTIFY

| | | |
|------------------------|----------------------------|--------|
| Current 10 requests | Sent to Plan 0 requests | Search |
|------------------------|----------------------------|--------|



Search

Search requests

e.g.: patient name, drug name, your identifier, or people sharing.

FINDING AN ARCHIVED REQUEST:

To view an Archived request, use the “Search” tab located on your Dashboard. You can filter your search results by Open Requests Only, Archived Requests Only, or both Open and Archived Requests.

After Archiving a request, it is removed from your dashboard and an email is sent to all users with access to the request.

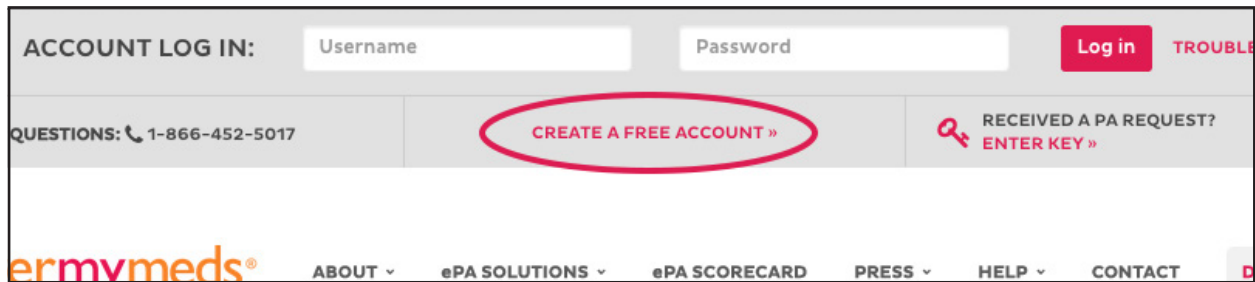
- For approved or denied requests, the shared user(s) receives an email notifying them of the determination.
- For requests that were not sent to the plan or have unknown outcomes, the user(s) receives an email notifying them the request has been removed from their dashboard.

TIP:

You can also use the Search tab to locate a request using the patient’s last name, drug name, your identifier, or people sharing.

SETTING UP A GROUP

Using a group in CoverMyMeds is the most secure way for multiple staff members to manage PAs. Each user has their own log in, and members can be added or removed at the administrator's discretion.



The screenshot shows the top navigation bar of the CoverMyMeds website. On the left, there is a 'ACCOUNT LOG IN:' section with input fields for 'Username' and 'Password', a red 'Log in' button, and a 'TROUBLE' link. Below the login section, there is a row of links: 'QUESTIONS: 1-866-452-5017', a red oval highlighting the 'CREATE A FREE ACCOUNT »' link, and 'RECEIVED A PA REQUEST? ENTER KEY »'. At the bottom of the header, there is a navigation menu with the CoverMyMeds logo and links for 'ABOUT', 'ePA SOLUTIONS', 'ePA SCORECARD', 'PRESS', 'HELP', and 'CONTACT'.

SETTING UP A GROUP

1. After setting up an account, whoever would like to be the administrator of the group will call CoverMyMeds at 866-452-5017 to set up a group.
2. You will need to provide your username and what you'd like your group to be named. We can set the group up for you in just a few seconds.

TIP:

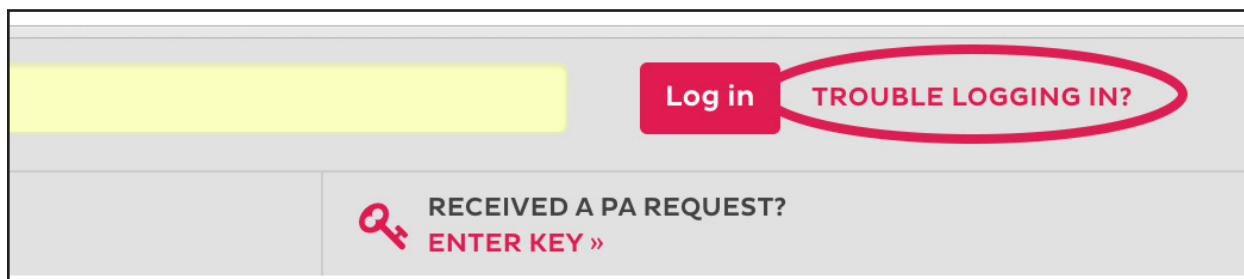
PA requests and prescriber signatures are shared among all group members, so any staff member can view and complete the work for the office.

After setting up a group, the administrator will be able to:

- Invite group members by username or email.
- Remove group members
- Create new groups

PASSWORDS

If you have forgotten or would like to update your password, CoverMyMeds can help you quickly log in to your account.



TO RECOVER YOUR PASSWORD:

1. Go to covermymeds.com and click on "Trouble logging in?"
2. Enter your email address and click "Recover."
3. Check the email address associated with your CoverMyMeds account and follow the link to reset your password.

TO CHANGE YOUR PASSWORD:

1. Log in to your CoverMyMeds account and click "Your preferences."
2. Scroll down to Account Management.
3. Enter your current password, the new password, and confirm it.
4. Click "Save and Return to Dashboard."

SUPPORT RESOURCES

At CoverMyMeds we know prior authorizations (PAs) can be tricky and time consuming. That's why we have a team of experts and a variety of help resources to make PAs faster and easier for you.

CALL OR CHAT FOR HELP

Phone: 866.452.5017 | **Live Chat:** covermymeds.com | **Email:** help@covermymeds.com
Monday - Friday: 8AM EST - 11PM EST, Saturday: 8AM EST - 3PM EST



WEBINARS

Weekly 15-20 minute live demos are hosted by our PA experts. Can't make a scheduled training? Call and schedule a time that works for you.



TRAINING VIDEOS

Short, instructional videos cover all the basics, including everything you need to know about CoverMyMeds in four minutes.



FAQS

Find answers to our most common user questions.



USER GUIDE

Filled with detailed directions, this guide is great to have on hand.

Visit www.covermymeds.com/main/help
then click "See All Support Materials"