Section 1: ExpressPAth Overview

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ExpressPAth Overview

The ExpressPAth Provider Portal - [https://www.express-path.com](https://www.express-path.com) - is a web-based portal that can be used to request prior authorization for drugs and services for patients who are covered under certain health plans’ pharmacy and/or medical benefits. Prescribers and Providing Facility office managers can complete registration and designate medical and non-medical staff to manage prior authorizations on their behalf.

ExpressPAth is available to registered users 24 hours a day, 365 days a year. The convenience of an online tool allows the user to begin and complete an authorization request on their schedule. Also, following up on a request is as simple as entering in the patient information and viewing the results as time allows during a busy work day.

Using ExpressPAth has other advantages for providers and their office staff as well. Here are just a few:

- Increase efficiency by reducing paper forms, faxing time or time on the phone
- Providers can manage their own information or designate others to request prior authorizations on their behalf
- Manage renewal requests electronically
- Upload or fax additional documentation, such as lab results or other clinical information, to support the prior authorization request
Accessing ExpressPAth

ExpressPAth Provider Portal is compatible with Microsoft Internet Explorer (versions 6, 7, and 8) and Firefox. It is also supported by both Apple and Windows Safari Browser.

To access ExpressPAth:

1. Double-click or the icon for your web browser.

2. In the Address field, type the ExpressPAth URL.

   This URL is https://www.express-path.com

   Notes:  Do NOT add the ExpressPAth URL to your Favorites, or you may have problems accessing the most current version of the Provider Portal if we release a new version.  You may add a shortcut (see instructions on page 5 of this section).

   Pop-up Ad Blocker must be turned OFF.

3. Press Enter

   .
Creating a Desktop Shortcut for ExpressPAth

To create a Desktop shortcut for ExpressPAth:

1. Go to your Desktop.
2. Right click your mouse in any blank area on your Desktop.

A menu appears when you right-click.

3. Move your mouse to the “New” menu option.

A secondary menu appears.
4. On the secondary menu, select **Shortcut**

The following box appears.

![CreateShortcut](image1)

5. Place your mouse inside the text box. Type the URL below. The URL is **https://www.express-path.com**

6. Click **Next**. The following box appears.

![SelectTitle](image2)

7. Type a name for the shortcut in the field provided. For this example, we will use “ExpressPAth”.

8. Click **Finish**. The box closes.

The Desktop shortcut is now ready.
Navigating

You can navigate through ExpressPAth using several methods.

- To access different sections of ExpressPAth, use the tabs that are located at the top of each page.

- Hyperlinks are embedded into forms in the work area

  Edit  Remove

And on the left side of pages

- Buttons are embedded into left menus and into work area forms

- The Stage Progress indicator at the top of the ExpressPAth work area checks off steps as they are completed.
Printing

Any user in ExpressPAth Provider Portal has the ability to print the screen using the icon anywhere within the application. This print icon is located on every page towards the top right corner of the screen.

**Note:** Only the information that appears on your screen display is printed. If the record is longer than your screen display, you must scroll up or down in the record and repeat the process above if you want to print information further up or down in the record.
Accessing the User Guide

You can access a PDF of the User Guide from a link within ExpressPAth.

To access the User Guide:

From any page, click Help in the top right corner of the screen.

A PDF of the ExpressPAth User Guide appears. You are automatically taken to a specific point within the user guide based on the tab and/or link that you are working in within ExpressPAth.

If you are not yet logged in to ExpressPAth, you will only see Section 1 (Overview) and Section 2 (Registration and Settings). Once you login, you will also see all of the remaining sections in the user guide.

Accessing Tutorials

You can access ExpressPAth video training modules from a link within ExpressPAth.

To access the tutorials:

1. From any page, click Tutorial in the top right corner of the screen.

   A menu of tutorials displays. Based on the tab and/or link that you are working in within ExpressPAth, you may see different tutorials that are relevant to that section (e.g., not all tutorials that are available in ExpressPAth will display in every tab).

2. Click on the desired tutorial to select it.

   Navigational arrows, play & pause buttons display on the tutorial.

   Note: There is no sound on any of the tutorial videos.

3. When the tutorial ends, you may replay it or click the red X to close it.
Using Support

You are able to request technical assistance by using the Support link.

To request technical assistance,

1. Click the Support link.

   An email form opens.

2. Click the **Priority** dropdown arrow and select the priority of the issue. Press **Tab**.

3. In the **User ID** field, type your User ID. Press **Tab**.

4. In the **Enter your Email ID** field, type your email address. Press **Tab**.

5. In the **Subject** field, briefly explain the issue that you are having with ExpressPAth.
6. In the **Description** field, type a detailed description of your ExpressPAth technical issue.

   **Note:** If your question is clinical, not technical, please contact the health plan.

7. If needed, in the **Attachment file** field, click the **Browse** button and add an attachment to the support request.

8. In the **Enter the code as shown in Image** field, type the code as seen in the spatter box.

9. To submit your request for support, click **Submit**

10. Someone on the ExpressPAth Support team will reach out to you as they work to resolve your issue (typically within one to two business days).
Logging In

1. **Login area** displays before a user logs into ExpressPAth and is also used for registration.

2. **Work area** contains active information and forms while working in ExpressPAth.

3. **NIH News** contains links to National Institute of Health news.

To log in to ExpressPAth:

1. In the **Enter your User ID** field, type your previously selected User ID.

2. In the **Enter your password** field, type your previously selected case-sensitive password.

   **Note:** Your password for ExpressPAth expires every six months.

3. In the **Enter the below text** field, type the code number displayed in the shaded security code area.

4. Click the **Sign In** button or press **Enter** on your keyboard.
After you have registered or logged into ExpressPAth, the **Prior Authorization Portal for Providers** page displays.

**Prior Authorization, Settings, and Logout tabs** display after a registered user logs into ExpressPAth. The active tab is yellow.

**Prior Authorization Portal for Providers** contains hyperlinks and buttons to initiate, complete, search for a previously submitted PA request, or search for prior authorizations about to expire.

**Note:** If ExpressPAth is inactive for 20 minutes, you will automatically be logged out of the tool. ExpressPAth will show you as logged out, but a Login link on the page allows you to immediately log back in.
Forgot Your User ID or Forgot Your Password

Forgot Your User ID?

To recover your ExpressPAth User ID:

1. On the ExpressPAth Login tab page left column, click on the Forgot your User ID link.

   ![Login Page](image)

   The I am a field dropdown displays.

   ![I am a Dropdown](image)

2. To identify your role in ExpressPAth, click the dropdown arrow.
Your choices are Prescriber, Agent, or Providing Facility.

3. Select the role (which you chose during registration) that best describes you.

You are moved to the next step.

For Prescribers:

If you are a Prescriber, the form below displays.

1. In the Who is a field, click the dropdown and select the correct descriptor (which you chose during registration) that best describes you.

2. You have a choice of which prescriber ID you enter. Select either the DEA, NPI or SLID (State License ID) field and type the appropriate ID.

Note: Only your NPI is required during registration. DEA and State License ID (SLID) are not required during registration. If DEA and State License ID were not entered during registration, a search by DEA or SLID will be unsuccessful.
3. In the **Email ID** field, type your email address.

4. Click **Next**.

If your information does match the information in the system, **Secret Question** and **Answer** fields display as part of the **Forgot your User ID** login.

5. In the **Answer** field, type the correct answer to the **Secret question** that you selected during registration.

6. Click **Submit**.

A message displays indicating that your user ID has been sent to your email address.

When you open your email, you will see an email message from ExpressPAth stating, “The following User ID has been requested for (Requestor Name) : abc123

The email contains a link to use “to continue, creating, modifying and checking the status of prior authorizations with the User Id provided above.”
For Agents:

If you are an Agent, the form below displays.

1. In the **I work at** field, click the dropdown arrow and select the correct descriptor (which you chose during registration) that best describes your office location.

2. In the **NPI** field, type the NPI of a prescriber or provider to whom you are associated. This is a required field.

3. **First Name** and **Last Name** fields are optional.

4. Optional: In the **PPI** field, type the unique ExpressPAth Prescriber ID that was sent to the Physician for whom you are an agent. This number is available in the physician’s activation email.

5. In the **Email ID** field, type your email address. This is a required field.

6. Click **Next**
If your information does match the information in the system, **Secret Question** and **Answer** fields display as part of the **Forgot your User ID?** login.

7. In the Answer field, type the correct answer to the Secret question that you selected during registration.

8. Click **Submit**

A message displays indicating that your user ID has been sent to your email address.

When you open your email, you will see an email message from ExpressPAth stating, “The following User ID has been requested for (Requestor Name) : abc123
For Providing Facilities:

If you are a Providing Facility, the form below displays.

1. In the I work at a field, click the dropdown and select the correct descriptor (which you chose during registration) that best describes your office location.

2. You have a choice of which providing facility ID you enter. Select either the DEA, NPI or SLID (State License ID) field and type the appropriate ID.

   Note: Only your NPI is required during registration. DEA and State License ID (SLID) are not required during registration. If DEA and State License ID were not entered during registration, a search by DEA or SLID will be unsuccessful.

3. In the Email ID field, type your email address.

4. Click Next
If your information does not match the information in the system, the following message displays.

![Message](image)

If your information does match the information in the system, Secret Question and Answer fields display as part of the Forgot your User ID? login.

**Note:** The example shown is for an agent, but is similar for all users.

6. In the Answer field, type the correct answer to the Secret question that you selected during registration.

7. Click [Submit].

A message displays indicating that your user ID has been sent to your email address.

![Message](image)

When you open your email, you will see an email from ExpressPAth stating, “The following User ID has been requested for (Requestor Name): abc123. The email contains a link to use “to continue, creating, modifying and checking the status of prior authorizations with the User Id provided above.”
Forgot Your Password?

After you have entered your user ID, if you are unable to recall your password:

1. Click the **Forgot your password?** link.

2. For your assigned role, follow the same instructions given for **Forgot your user ID?**
Logging Off

You can log off at any time.

To log off, click the **Logout** tab.

A message displays that you have successfully logged out.

**Note:** You will automatically be logged out of ExpressPAth after 20 minutes of inactivity.

A link displays to log back in.
Section 2—ExpressPAth Registration and Settings

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Navigating the ExpressPAth Login

The Login Page is where registered users will login or new users will register to use ExpressPAth. On the right side, NIH (National Institutes of Health) news is displayed.

When you launch ExpressPAth, the first page you will see is the Login Page.

Some of the elements you will encounter on this page include:

1. **Login tab**
   - Login area is where registered users log in to ExpressPAth and new users register to use the tool. A security code displays and must be entered during every login. When login is complete, users click the Sign in button to proceed.

2. **ExpressPAth work area**: Displays a brief description of prior authorization tasks that may be performed in ExpressPAth.

3. **Help area**: Help, Tutorial, and Support links are located here.

4. **NIH News Column** contains National Institutes of Health article links.
Registering Prescribers and Providing Facilities

These instructions are for registering the following ExpressPAth users:

- Physicians
- Pharmacists
- Nurse Practitioners
- Physician Assistants
- Home Infusion Therapy Providers
- Specialty Pharmacies
- Outpatient Facilities
- Dialysis Centers

To register as an ExpressPAth user:


2. On the ExpressPAth Login tab page left column, click on the Click Here to Register link.
During the registration process, the page display changes.

1. **Stage Progress indicator** at the top of the ExpressPAth work area checks off steps in the registration process as they are completed.

2. **Progress Bar** displays on the left side of the page to visually indicate the registration stage and the remaining steps.
Registering as a Prescriber/Providing Facility

Step 1: Terms and Conditions:

1. In the Image Verification Code field, type the code that you see in the picture.

2. Read the Service Agreement. You will need to scroll down to review the complete agreement.

3. To agree to the terms of the Service Agreement, click the Accept radio button.

4. Click Next.

Clicking the Decline radio button terminates the registration process.
Step 2: Define Your Role:

1. To the right of “I am a”, click the dropdown arrow

   ![Dropdown Menu]

   I am a: 
   
   - Prescriber
   - Agent
   - Providing Facility

   **Note:** Fields followed by a red asterisk (*) are required.

   Refer to the table below for assistance in populating these fields:

<table>
<thead>
<tr>
<th>If you are registering as a:</th>
<th>In the following field:</th>
<th>Select from the following:</th>
</tr>
</thead>
</table>
   | Prescriber                    | Who is a                | • Physician
   |                               |                         | • Physician Assistant
   |                               |                         | • Pharmacist
   |                               |                         | • Nurse Practitioner
   | Providing Facility            | I work at a             | • Physician Office
   |                               |                         | • Home Infusion Therapy Agency
   |                               |                         | • Specialty Pharmacy
   |                               |                         | • Outpatient Facility
   |                               |                         | • Dialysis Center

Step 3: License Information and Upload License:

1. In the **NPI** field, type your NPI number. This is a required field.

   **NPI:** The National Provider Identifier (NPI) is a unique identification number for health care providers issued by the National Plan & Provider Enumeration System (NPPES) that will be used by all health plans. NPIs are issued to health care providers in order to submit claims or conduct other transactions specified by HIPAA.

   **Note:** If you are registering as an individual prescriber or provider, use your individual NPI. If you are registering as a providing facility, use your organizational NPI.

   **State License (optional):** Number issued on a State Medical License by the state where the physician practices medicine.
To upload your license from an electronic file, click the Upload checkbox and then click the button.

A copy of your license is required to validate your credentials.

2. Locate the license file saved on your computer and select it.

The file address will display in the field.

**Note:** The file must be 4MB or less and must be in JPG, TIFF, GIF, PDF, BMP, DOC or DOCX format. The ExpressPAth Registration Validation team will validate your credentials prior to sending your registration activation confirmation email (within two business days of receiving a legible copy of your credentials).

3. To upload the file, click the button.

**Note:** If you do not have an electronic copy of your license, you can fax your license by clicking the Fax checkbox. Then, download a copy of the fax cover sheet by clicking on the hyperlink. Fill out the information requested on the cover sheet and fax it along with a copy of your license to the fax number on the screen.

4. Click

If your NPI is located in the CMS (Centers for Medicare and Medicaid Services) database, your demographic information will be pre-populated on the form.

If your demographic information is not found in the CMS database, you can enter it manually.

**Note:** If you manually update your demographic information in ExpressPAth, you will need to contact CMS in order for your updates to be reflected in that database.
1. Verify that this information is correct (all fields are editable, if necessary).
   or
   Manually enter the data.

2. In the **Enter your Email ID** field, type your email address.
   You will be asked to enter your email address twice to validate this field. Both emails must match.

   To disable email notifications, place a check in the box next to the

   **Opt out of Daily Email Summary:** ☑

   Or

   If you do not opt out, you will receive an email every day that there is activity in any of the listed categories for PA’s that you are associated with:

   **LOW:** You will receive a daily summary showing a total of all approvals, denials, withdrawals, or PA’s requiring further information for that day.

   **MEDIUM (default):** In addition to receiving low notification emails, you will get an email each time a PA that you initiated (or a PA that you are associated with) requires further information for you to enter/submit.

   **HIGH:** In addition to receiving low and medium notifications, you will get an email notification each time a PA you initiate or are associated with is approved, denied, or withdrawn.
3. In the **Specialty** field, click the Specialty dropdown and select your specialty or

In the **Taxonomy Code** field, enter your taxonomy code number. The Health Care Provider Taxonomy codes are national specialty codes used by providers to identify their specialty category. The codes are created by the National Uniform Claim Committee (NUCC), which is chaired by the American Medical Association. Paste the link below into your web browser in order to obtain the list of taxonomy codes and to identify the correct code to use for your specialty.


When one of these fields has been populated, the other field auto-populates.

4. Click **Next**

**Setting Your User ID and Password**

**Step 5: Login Information:**

1. To enter your User ID, in the **User ID** field, enter your own unique user ID, then click the **Check** button to confirm that ID is available or

   To have ExpressPAth suggest a unique User ID for you, click the **Suggest** button.

2. In the **Password** field, type your password.

   **Note:** Passwords must be at least six characters long and must contain at least one upper case character, one lower case character, one digit and one special character.
3. In the **Re-enter Password** field, retype your password.

4. In the **Secret Question** field, click the dropdown arrow and select a secret question.

5. In the **Answer** field, type the answer to your secret question. If you forget your password, this will be used to verify your identity.

To complete the registration process, click the [Register] button.

**Step 6: Registration Complete:**

![Step 6: Registration Complete](image)

A message displays that indicates that you will receive a confirmation/activation email within two business days after the ExpressPAth Registration/Validation team has received a legible copy of your state license/credential information.

**IMPORTANT:** Please add donotreply@exppa.com to your list of email contacts so that the activation confirmation email does not go to your Spam/Junk email folder.

6. Click the Close button to complete your registration.

7. Once the confirmation/activation email is received from the ExpressPAth team (usually within two business days), you can begin using ExpressPAth for prior authorization requests for patients with participating health plans.
Registering Agents

These instructions are for registering ExpressPAth users who are Agents. An Agent is anyone who can perform Prior Authorization functions on behalf of a Prescriber or Providing Facility. Examples of Agents include medical or non-medical office staff such as:

- Office Managers
- Administrative Assistants
- Secretaries
- Nurses

**Important:** An Agent cannot register until their associated Prescriber or Providing Facility has completed the registration process in ExpressPAth. The Prescriber/Providing Facility does not have to be activated for the agent to register.

To register as an ExpressPAth Agent:


2. On the ExpressPAth Login tab, click on the **Click Here to Register** link on the left-hand side.

   The ExpressPAth **Home** Tab displays.

Registering as an Agent

**Step 1: Terms and Conditions, as follows:**
2. In the Image Verification Code field, type the code that you see in the picture.

3. Read the Service Agreement. You will need to scroll down to review the complete agreement.

4. To agree to the terms of the Service Agreement, click the Accept radio button.

5. Click Next.

Clicking the Decline radio button terminates the registration process.

Step 2: Define Your Role form: On the I am a dropdown list, select Agent.
7. **Step 3: License Information:**

8. **In the I work at a field,** click the dropdown arrow.

9. **Select the appropriate agent work location description.**
You must associate yourself to a physician or providing facility by one of the following:

- by NPI
- by Facility Name
- by First and Last Name
- PPI

**Note:** PPI is a unique ExpressPAth ID that is sent to the Physician when they register. This number is available in the physician’s activation email and is not a required field.

**Search for an existing physician:** enter required information to locate a prescriber or provider:

1. In the **NPI** field, type the prescriber or providing facility’s NPI number
   or
   In the **Facility Name** field, type the name of the providing facility
   or
   In the **First Name** field and the **Last Name** field, type the prescriber or provider’s name.

2. Click **Search**

If the physician is located, the **Prescriber Search** box displays.
3. If the correct physician is displayed, in the **Prescriber Name** field, click the prescriber’s name hyperlink.

   **Note:** If more than one page of records is returned, use the left and right arrows on the bottom right to navigate back and forth within the records.

**Step 3: License Information:** redisplays in the work area, with the NPI and Name fields populated with the prescriber information.

4. If you support more than one physician, you will repeat the search information for additional physicians by clicking **Add Another**.

   You may add up to 10 prescribers/providers during registration.

   **Note:** Additional prescribers/providers can be added by accessing the Settings tab and adding them through the **My Physicians** link once you have completed your registration. See the **Settings - Managing Your Profile Information – Agents** section for instructions on how to add prescribers/providers through your Settings tab.

5. When all physicians (up to ten) have been added to your profile, click **Next**.
Step 4: About You:

1. In the **First Name** field, type your first name (required field).
2. In the **Last Name** field, type your last name (required field).
3. In the **Enter your email address** field, type your email address (required field).
4. In the **Retype Email ID** field, type your email address again (required field).

To disable email notifications, place a check in the box next to the

| Opt out of Daily Email Summary: | ☑ box |

or

If you do not opt out, you will receive an email every day that there is activity in any of the listed categories for PA’s that you are associated with:

- **LOW**: You will receive a daily summary showing a total of all approvals, denials, withdrawals, or PA’s requiring further information for that day.

- **MEDIUM (default)**: In addition to receiving low notification emails, you will get an email each time a PA that you initiated (or a PA that you are associated with) requires further information for you to enter/submit.

- **HIGH**: In addition to receiving low and medium notifications, you will get an email notification each time a PA you initiate or are associated with is approved, denied, or withdrawn.

5. Click **Next**
Step 5: Login Information:

1. In the **User ID** field you may enter your own unique user ID, then click the **Check** button to confirm that ID is available.

   or

   To have ExpressPAth suggest a unique User ID for you, click the **Suggest** button.

2. In the **Password** field, type your password.

   **Note:** Passwords must be at least six characters long, and must contain at least one upper case character, one lower case character, one number and one special character.

3. In the **Re-enter Password** field, retype your password.

4. In the **Secret Question** field, click the dropdown arrow and select a secret question.

5. In the **Answer** field, type the answer to your secret question. If you forget your password, this will be used to validate you.

6. To complete the registration process, click the **Register** button.

   The **Registration Complete** page displays in the work area, shaded, with a Thank You popup message in front. It describes how an email has been sent to each of the designated providers with instructions for them on how to activate the Agent’s account.
7. To exit, click OK.

Prescriber/Provider Confirms Association to Agents

The last step to allow agents to perform Prior Authorization tasks on their behalf is for the prescriber/provider to finalize the agent’s association request.

The prescriber/provider receives an Agent Authentication email that an agent has requested association to them. Within the email there is a link to the Agent Authentication form.

To confirm an agent association to a prescriber/provider:

1. Click the link provided in the email from ExpressPAth (donotreply@exppa.com) or paste the URL in the email into your internet browser address bar.

   Note: You will need to login before you are taken to the agent authentication form.
The **My Agent** page displays.

![My Agent page screenshot](image)

2. **Set the Agent Status** field to Active.

   Other Agent information fields become available.

   The **Start Date** default is today’s date.

3. **To change the start date,** in the **Start Date** field type the start date in the following format: **MM/DD/YYYY**

4. **In the Deactivate Agent on** field, change the date from today’s date to any date in the future. If you wish to make this agent active until you manually deactivate them, type in **12/31/2099** in this field.

5. **In the Assign Privileges area,** select all of the privileges you want to apply to this agent.

6. **When all of the desired check boxes are populated,** click the **Save** button

   A pop-up confirmation message displays and an email is sent to the Agent to notify them that they are now able to perform Prior Authorization tasks on behalf of the prescriber/provider.

**Note:** The prescriber/provider’s account must have been validated and activated in order for the agent to perform PA tasks for that prescriber/provider.
7. Click OK.

The **Settings** tab opens on the **My Agents** page. Click the **Home** link near the top left corner of the screen to return to the ExpressPAth landing page.
Settings - Managing Your Profile Information - Providers

By accessing the Settings tab in ExpressPAth, you are able to manage your profile information, including editing your information and changing your password. Providers and providing facilities are also able to view, edit, or add practice locations and add agents, deactivate agents and manage associated agents’ privileges.

My Information (Providers)

Viewing Your Credential Information

1. Click on the Settings tab.
The Settings page displays in the work area with the Account Home menu open.

2. Click the **My Information** link.

or

Click **My Information**

The My Credential Information page displays.

Locked fields display with gray text. These cannot be edited.

Editable fields display with black text.
Editing Your Credential Information

1. Click on the Settings tab.

2. Click the My Information link.

   The My Credential Information page displays.

3. You may edit any editable field (those without greyed out text).

   **Note:** The Address fields, Work Phone, Email, Specialty, Taxonomy Code and Secret Question and Answer fields are editable and required, as indicated by a red asterisk (*).

4. To save your edits, click **Save**.

   **Note:** If the email associated to you is shared by another user ID, a popup message will display, asking “Are you sure you would like to continue to update the system with this email address?”

   Click **OK** to continue.

   or

   Click **Cancel** to end the action.

   **Note:** Any Agent with Office Manager privileges is able to edit a provider’s My Information page. They are not able to change the provider’s password or secret question/answer.

   **Note:** Any updates made to your profile in ExpressPAth will not be reflected in the Centers for Medicare and Medicaid Services (CMS) database. Please contact CMS to ensure your records on file are current.

E-mail Summary

To disable email notifications, place a check in the box next to the

**Opt out of Daily Email Summary:**

or

If you do not opt out, you will receive an email every day that there is activity in any of the listed categories for PA’s that you are associated with:

**LOW:** You will receive a daily summary showing a total of all approvals, denials, withdrawals, or PA’s requiring further information for that day.
**MEDIUM (default):** In addition to receiving low notification emails, you will get an email each time a PA that you initiated (or a PA that you are associated with) requires further information for you to enter/submit.

**HIGH:** In addition to receiving low and medium notifications, you will get an email notification each time a PA you initiate or are associated with is approved, denied, or withdrawn.

![Provider Portal Registration Image]

---

**Table:**

<table>
<thead>
<tr>
<th>Credential Information</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Name:</td>
<td>SmithJohn</td>
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<tr>
<td>PPE:</td>
<td>12345</td>
</tr>
<tr>
<td>Prefix:</td>
<td>Dr.</td>
</tr>
<tr>
<td>Middle Initial:</td>
<td>J</td>
</tr>
<tr>
<td>Facility Name:</td>
<td>Hospital</td>
</tr>
<tr>
<td>Address Line 1:</td>
<td>123 Main St.</td>
</tr>
<tr>
<td>City:</td>
<td>Anytown</td>
</tr>
<tr>
<td>State:</td>
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</tr>
<tr>
<td>Zip:</td>
<td>12345</td>
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<tr>
<td>Email:</td>
<td><a href="mailto:John.Smith@Hospital.com">John.Smith@Hospital.com</a></td>
</tr>
<tr>
<td>Role:</td>
<td>Provider</td>
</tr>
</tbody>
</table>

**Image:**

A screenshot of the Provider Portal with commented fields indicating the ability to opt out of daily email summaries.
My Practice Locations (Providers)

Viewing Practice Locations

1. Click on the Settings tab.

2. Click the My Practice Locations link.
   or
   Click My Practice Locations

A list of Practice Locations associated to you displays.
Editing a Practice Location

1. Click on the **Settings** tab.

2. Click the **My Practice Locations** link.

   or

   Click the **My Practice Locations** link.

A list of My Practice Locations associated to you displays.

3. Click the **Edit** link associated to the desired location.

The existing location information displays as a form.

4. Make edits to the location.

   **Note:** Fields marked by a red asterisk (*) are required fields and must be populated.

5. To save your changes, click **Save**

   or

   To cancel without saving your changes, click **Cancel**
ExpressPAth saves the changes to the selected practice location and returns you to **My Practice Locations**.

**Adding a Practice Location**

1. Click on the **Settings** tab.
2. Click the **My Practice Locations** link.
   or
   Click the **My Practice Locations** [Go](#).

A list of Practice Locations associated to you displays.

3. Click the **Add** link.

A blank location form displays.

4. Enter information for the added practice location to the form.

   **Note:** The **Address Line1**, **City**, **State**, **Zip**, and **Type** (only one primary location type is allowed – all others must be secondary) fields are required.
5. Click **Save**

ExpressPAth saves the new practice location and returns you to **My Practice Locations**.

**Deleting a Practice Location**

1. Click on the **Settings** tab.

2. Click the **My Practice Locations** link.

or

Click the **My Practice Locations** [Go](#)

A list of My Practice Locations associated to you displays.

3. Click the **Edit** link associated to the desired location.

The existing location information displays as a form.

4. Click **Delete**.

ExpressPAth returns you to **My Practice Locations**. The deleted practice location is no longer listed.
Note: Any Agent with Office Manager privileges is able to manage their associated provider’s My Practice Locations profile. They are able to add, edit or delete practice locations on behalf of the provider.

My Agents (Providers)
Registered Providers and their Agents designated as Office Managers are able to initiate, confirm and manage agent associations in ExpressPAth. The My Agents page is used to assign, edit, or remove agent privileges, and to add additional agents.

To view My Agents:

1. Click on the Settings tab.

   The Settings page displays with the Your Options menu open.

   ![Screen Shot]

2. To view your associated agents, click the My Agents link.

   or

   Next to My Agents click

   The My Agents page displays in the work area.
In the My Agents area, a list of agents to whom you are associated displays.

Note: The current privileges assigned to an agent are listed in the Privileges field.

Adding an Agent

You are able to initiate an association to an agent by locating the agent and adding the agent to your agent list. The agent must be registered and associated to at least one other provider in the ExpressPAth Provider Portal in order for the agent to return in the search results.

To add an agent:

In the upper right corner of the My Agents page, click the My Agents Add link.
The **Search for an Agent** popup box displays. You will search in the system for the agent. You may search for an agent by first and last name or by email.

**Searching for an Agent**

1. Populate the **First Name** and **Last Name** fields  
   or  
   Populate the **Email** field with the desired agent’s information.

2. Click **Search**
If there are matches to the search, ExpressPAth displays the search results beneath the search criteria.

3. Click on the hyperlink of the agent’s name.

If the agent is already associated to you, the message “Agent Already associated with Physician” displays.

The agent must be registered and associated to at least one other provider in ExpressPAth in order for the agent to return in the search results. Otherwise, the following message displays.
If the searched-for agent is not associated to the provider and has registered as an agent for any other provider in ExpressPAth Provider Portal, the agent will be included in the search results.

When the agent has been selected by clicking on the hyperlink with their name in the search results, the Assign Privileges to Agent pop-up box displays.

4. To assign privileges to the agent, click the checkboxes to select the desired privileges.

5. To confirm the assignment of privileges, click Ok
   or
   To cancel the assignment, click Cancel

A message displays, indicating the Agent’s record has been updated.

ExpressPAth adds the selected agent to your My Agents list.

A confirmation email is sent to the agent’s registered email, containing login instructions.

Note: Agents receive emails to inform them that they have been activated by their providers and that they are now able to perform assigned prior authorization privileges on their behalf.

Note: Agents with Office Manager privileges are able to manage their providers’ My Agents settings. Office Managers have the ability to add agents, as well as edit their privileges, or deactivate agents on behalf of their associated providers.
Editing My Agents

You are able to edit privileges assigned to agents, to change the agent’s status, and to amend the period of privileges.

1. Click on the **Settings** tab.

   The Settings page displays with the Your Options menu open.

2. Click the **My Agents** link.

   or

   Next to **My Agents** click [Go]

   The **My Agents** page displays in the work area.
4. Locate the agent for whom edits are required.

5. Click the associated **Edit** link.

The My Agent (Edit Agent Information) page displays in the work area.

6. To edit the agent’s privileges, click the **Assign Privileges** checkboxes to select or deselect privileges.

7. To edit the agent’s status, click the **Agent status** dropdown arrow.

   If you are changing agent status from “Inactive” to “Active,” you must also assign at least one privilege to the agent before you are able to save the edits.

8. To edit the dates in the **Deactivate Agent on** field, click the calendar or
   Type the amended date in the **Deactivate Agent on** field (MM/DD/CCYY).

   **Note:** In order to deactivate an agent immediately, the Provider must choose a date *prior to the current date* in the **Deactivate Agent On** date field. An agent can also be deactivated on any date in the future by selecting that date. When that date arrives, the agent’s status will automatically be changed to “Inactive” in ExpressPath.
Section 2—Provider Portal Registration

9. To save your edits, click **Save**

**Note:** If you assign the Office Manager privilege to more than three users, subsequent office manager assignments will prompt a popup to display. The popup indicates that at least three office managers have been assigned and asks if you are sure you want to assign another.

10. To proceed, click **Yes**

ExpressPAth saves the privileges.

**Authorizing an Agent Request**

When an agent has registered and associated themselves to the prescriber, the prescriber receives email notification.

To authorize the agent:

1. Open the Agent Activation email.

2. Click the **link** embedded in the email

   or

   Copy and paste the URL address string into your internet browser address bar, and then click the Search icon.
ExpressPAth displays the login screen.

![Login Screen](image)

3. Log into ExpressPAth.

The My Agent (Edit Agent Information) page displays.

![My Agent Page](image)

3. Set the **Agent Status** field to Active.

Other Agent information fields become available.

The **Start Date** default is today’s date.

4. To change the start date, in the **Start Date** field type the start date in the following format: **MM/DD/YYYY**
5. In the **Deactivate Agent on** field, change the date from today’s date to any date in the future. If you wish to make this agent active until you manually deactivate them, type in 12/31/2099 in this field.

7. In the **Assign Privileges** area, select all of the privileges you want to apply to this agent.

8. When all of the desired check boxes are populated, click the **Save** button.

A pop-up confirmation message displays and an email is sent to the Agent to notify them that they are now able to perform Prior Authorization tasks on behalf of the prescriber/provider.

**Note:** The prescriber/provider’s account must have been validated and activated in order for the agent to perform PA tasks for that prescriber/provider.

The My Agent page redisplay with the changes displayed.
Settings - Managing Your Profile Information - Agents

By accessing the Settings Tab in ExpressPAth, you are able to manage your profile information, including editing your information and changing your password. Agents are able to request association to additional providers/providing facilities, remove association to providers/providing facilities and view other agents associated to their providers/providing facilities.

My Information (Agents)

Agents are able to edit and update their settings in the ExpressPAth Provider Portal.

To edit or update My Information:

1. When you have logged into ExpressPAth, click on the Settings tab.
   On the left side of the page, a list of Your Options displays.

2. To edit your information, click the My Information hyperlink or
   Next to My Information, click
You are able to edit the following fields: all **Name** fields, **Email**, **Secret Question**, or **Answer**. You can also change your password here.

3. Click the desired field and type the updated information in the desired field.

5. When you are finished, click **Save**.

**E-mail Summary**

To disable email notifications, place a check in the box next to the **Opt out of Daily Email Summary** box

or

If you do not opt out, you will receive an email every day that there is activity in any of the listed categories for PA’s that you are associated with:

**LOW**: You will receive a daily summary showing a total of all approvals, denials, withdrawals, or PA’s requiring further information for that day.

**MEDIUM (default)**: In addition to receiving low notification emails, you will get an email each time a PA that you initiated (or a PA that you are associated with) requires further information for you to enter/submit.

**HIGH**: In addition to receiving low and medium notifications, you will get an email notification each time a PA you initiate or are associated with is approved, denied, or withdrawn.
My Physicians (for Agents)

My Physicians is a repository for providers to whom you are associated.

To view My Physicians information:

1. **Click on the Settings** tab.

   The Settings Home page opens, with the Settings menu displayed.

2. **Click on the My Physicians link.**
A list of physicians associated to the agent displays.

Adding My Physicians

To add physicians to your My Physicians list:

1. Click on the Settings tab.

The Settings Home page opens, with the Settings menu displayed.
2. Click on the **My Physicians** link.

A list of physicians or providing facilities to whom you are associated displays.

3. Click the **Add** link.
The “Search for an existing Physician” pop up box displays.

There are four ways to search for a physician or providing facility.

Note: The physician or providing facility must have already registered for ExpressPAth Provider Portal in order to display in the search results. They do not have to be activated yet.

To search for a physician or providing facility by NPI number:

1. In the **Physician NPI** field, type the physician’s or providing facility’s NPI number.
2. Click **Search**

To search for a physician by name:

1. In the **First Name** field, type the first name of the physician.
2. In the **Last Name** field, type the last name of the physician.
3. Click **Search**

To search for a providing facility by name:

1. In the **Facility Name** field, type the providing facility’s name.
2. Click **Search**

To search for a physician by PPI number:
1. In the PPI field, type the ExpressPath ID number that was assigned to the provider during their registration.

2. Click Search. Search results, if any, display beneath the search area.

If the desired physician or providing facility displays in the search results area, to select the physician or providing facility:

1. Click on the **Prescriber Name**, which is a link.

   You will use the **Prescriber Name** link even if you are selecting a Facility. If no name is associated to the Facility, it will say “Unknown, Unknown” in the **Prescriber Name** field.

2. The system adds the physician or providing facility to your My Physicians list.

**Note:** An email is sent to the Physician or Providing Facility to inform them that an Agent has requested association to them. The provider must assign privileges and activate the agent through a link included in the email before the Agent is able to perform prior authorization tasks on their behalf.
Reminder to Activate

If a provider does not activate the agent in a timely manner, the agent is able to send an email reminder requesting that the provider complete the activation.

To send a reminder to the physician to activate the agent:

1. In ExpressPAth, click on the Settings tab.

   The Settings tab menu displays.

2. On the Settings tab menu, click the My Physicians link.

   The physician or physicians to whom you have requested association display.

3. Locate the physician who has not activated.

   Note: Agent Status will be “InActive.”

4. Click the Send Reminder to Activate link.
A message displays, indicating that a reminder has been sent.

5. If the physician does not activate the agent in a few days, the agent can click the “Send Reminder to Activate” link again and another email will be sent.

Disassociating from a Provider on your My Physicians List (Agent)

An agent who is associated to a provider is able to disassociate him/herself from the provider by removing the physician from their My Physicians List.

As an Agent, to remove association from a provider:

1. On the ExpressPAth Provider Portal Home page, click the Settings tab.
2. The **Settings** page displays in the work area with the Account Home menu open.

![Settings page](image)

3. Click the **My Physicians** link.

   The **My Physician** page displays.

![My Physician page](image)

**Note:** The system will display all Providers to which the Agent has requested an association, even if they have not been activated yet. The Agent has the ability to remove association for any provider listed here.

4. For the desired physician, click the **Remove** link.
A pop-up message displays, asking, “Do you want to remove this Physician?”

5. To continue removing the physician, click **Yes**.

A second pop-up message displays, stating, “Physician disassociated successfully.”

6. Click **OK**.

Your My Physicians list redisplay. The disassociated physician is no longer listed.

**Note:** When an Agent removes a Provider from their My Physicians list, an e-mail is sent to the Provider.

**Note:** Once an Agent has disassociated from a provider, that Agent is no longer able to perform prior authorization tasks on the provider’s behalf.

An Agent may remove association to all providers, but they will not be able to perform any prior authorization tasks in the ExpressPAth Provider Portal once all associations are removed.
My Physician Agents (for Agents)

Viewing My Physician Agents

Physician Agents are other agents that an Agent’s physicians or providing facilities are associated with in ExpressPAth. These other agents are also authorized to perform specific prior authorization tasks on behalf of that physician or providing facility.

1. Click on the Settings tab.

The Settings Home page opens, with the Settings menu displayed.
2. Click on the **My Physician Agents** link.

![My Physician Agents link](image)

A list of Physician Agents to whom your physicians or providing facilities are associated displays.

If your physician or providing facility is not associated to any other agents, the message “No Registered Agents available” displays.

![No Registered Agents available](image)

No action may be taken on this page.

**Note:** Agents with Office Manager privileges will see both a My Physicians link for all of their associated providers and/or providing facilities, as well as a My Agents link for all other agents that are also associated to their providers/providing facilities.

3. To return to the Settings menu, click the **Settings** tab.
   or
To exit ExpressPAth, click the **Logout** tab.
   or
To manage your prior authorizations, click the **Prior Authorizations** tab.
Creating a List of Favorite Rendering Providers
(Providers and Agents)

In the ExpressPAth Provider Portal, you are able to create a list of up to twenty favorite rendering providers, making it easier to select frequently used providers. Favorite Rendering Providers may be added manually or by searching. They may also be edited or removed.

Viewing Your Favorites

1. Log into ExpressPAth.
2. Click on the Settings tab.
The Settings page opens in the work area.

3. Click the My Favorite Rendering Providers link.

The My Favorite Rendering Providers summary page displays with your current favorite providers, if any.

My Favorite Rendering Providers
To create your own list of favorite rendering providers, you will first need to search for existing providers. If you are unable to locate the provider after searching, you will need to add the provider. You are also able to edit rendering provider information.

Because there is a limit of twenty favorite providers, if you exceed your limit and want to add a new rendering provider to your favorites, you will need to remove a provider first and then add the new provider.
Searching for Favorite Rendering Providers

1. Click on the **Settings** tab.

The **Settings** page opens in the work area, with the Settings menu open.

2. Click the **My Favorite Rendering Providers** link.
Creating a List of Favorite Rendering Providers (Providers and Agents)

The **Search Rendering Provider** page displays.

If you have no favorite rendering providers listed or if you want to add another favorite provider to your list, start your search by locating providers already in the system.

3. Click **Search**.

The **Search Rendering Provider** form pops up.

There are three ways to search for a rendering provider.

To search for a rendering provider by NPI number:

1. In the **NPI** field, type the rendering provider’s NPI number.

2. Click **Search**.
To search for a rendering provider by Facility Name:

1. In the **Facility Name** field, type the name of the facility.
2. Click **Search**

To search for a rendering provider by name:

1. In the **First Name** field, type the first name of the provider.
2. In the **Last Name** field, type the last name of the provider.
3. Click **Search**

The Search results display beneath the search criteria area.

4. If the desired prescriber/provider displays, in the **Provider Name** field, click the provider’s name. This is a hyperlink.
The selected provider displays as one of your favorite rendering providers.

5. If the desired provider does not display, click **Cancel**.

You will need to manually add the provider.

**Note:** Favorite Providers do NOT have to be registered in ExpressPAth.

### Adding a Favorite Rendering Provider

If a favorite rendering provider is not located by searching, you are able to manually add the rendering provider.

To add a Favorite Rendering Provider:

1. On the **My Favorite Rendering Providers** home page, click **Add**.
The **Add new Rendering Provider** pop-up displays.

![Add new Rendering Provider pop-up](image)

2. You must populate the mandatory fields indicated by a red asterisk (*) to manually add a rendering provider.

Mandatory fields include:

- NPI
- First Name
- Last Name
- Address Line 1
- City
- State
- Zip
- Work Phone
- Email Address
- Specialty (Note: Selecting the Specialty automatically populates the Taxonomy Code field)
- Taxonomy Code (Note: Entering the Taxonomy Code automatically populates the Specialty field)

3. You may also populate the Facility Name, Address Line 2 and Fax Number fields (optional).

4. Click **Save**

The provider is added to your favorites.
Editing a Favorite Rendering Provider

If any of the information for a retrieved provider needs to be updated, you will need to edit it.

To edit the information for an existing provider

1. Locate the provider on your Favorite Rendering Provider list and click the **Edit** link.

   ![Edit Rendering Provider popup](image)

   The **Edit Rendering Provider** popup displays, with the selected provider’s information.

2. Update the provider’s information.

3. Click **Save**
Removing a Rendering Provider

If you are attempting to add a rendering provider to your favorites, but you are already at your maximum of twenty favorites, a popup displays. It states, “The maximum number of Favorites has been reached. Only 20 Favorites may be designated.”

To remove the popup, click **OK**

**Note:** You will need to remove a rendering provider from your existing Favorites before you will be able to add another rendering provider to your Favorites list.

**Note:** You are able to remove rendering providers from your Favorites list at any time, regardless of whether you have reached your limit of twenty favorite rendering providers.

To remove a provider from your favorites:

1. On your list of **My Favorite Rendering Providers**, locate the provider to be removed.
2. Click the **Remove** link.

   A popup displays, stating: “Do you want to delete this provider from your Favorites?”

![Popup Image]

3. To remove the favorite provider from your favorites list, click **Yes** or
   To keep the favorite provider on your favorites list, click **No**

   Once you click **Yes**, the provider is removed from your list of Favorite Rendering Providers.

   You are now able to add an additional provider to your favorites.
Changing Your Password (Providers and Agents)

To view or edit your password information:

1. Click on the **Settings** tab.

   ![Settings Tab](image)

   The **Settings** page opens in the work area. (Shown is Provider view.)

2. Click the **My Information** link.
   
   or
   
   Click **My Information**

   The My Information page displays.
Changing Your Password (Providers and Agents)

The example shown below is for a provider.

3. Click the Change Password link.
   The Change Password page displays.
4. In the **Old Password** field, type your old password.

5. In the **New Password** field, type your new password.

**Note:** Your password must be at least six characters long. It cannot match any of the five previous passwords used. It must contain at least:

- One upper case alpha character
- One lower case alpha character
- One number
- One special character

6. In the **Retype New Password** field, retype your new password.

7. Click **Save**

The **Change Password confirmation** popup displays.

8. To exit the popup and confirm the password change, click **OK**

**Note:** Changing the password and changing the secret question/answer are the only My Information fields that an Agent with Office Manager privileges is not able to manage for their providers.