

## DELEGATE USER ACCESS FOR MEDICINE AND OSTEOPATHIC MEDICINE WRITTEN AGREEMENT - USER GUIDE

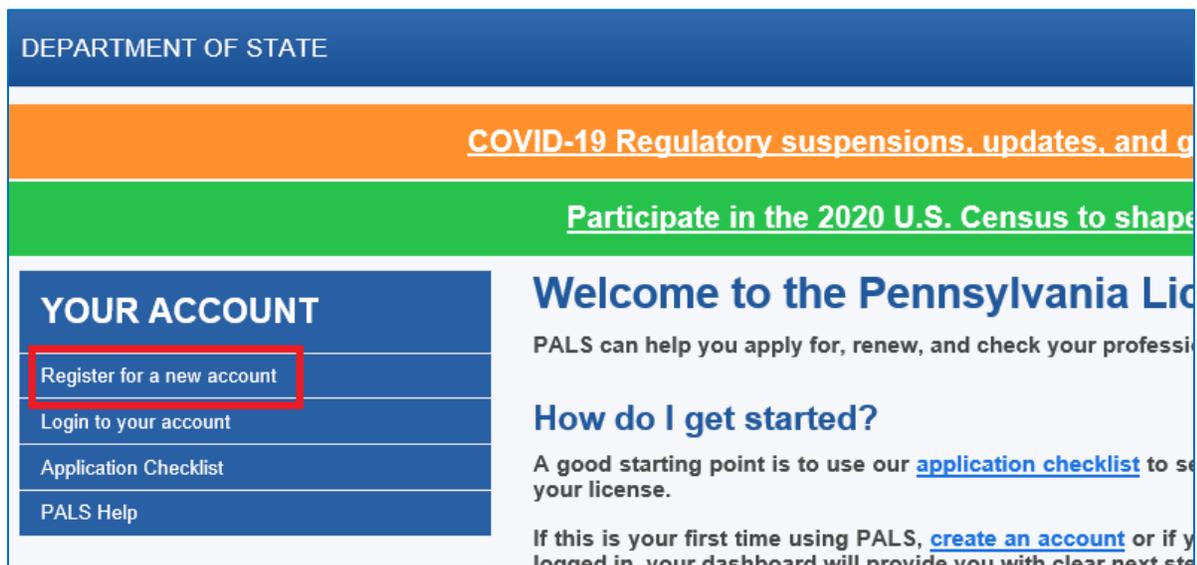
This user guide is for a PALS External Delegate User to register and be authorized to submit an Initial Written Agreement or Change of Written Agreement form on behalf of a Primary Supervising Physician and Physician Assistant. Please note that until each party in the relationship logs into PALS and completes their portion of the relationship request, the delegate cannot initiate an application on the licensee's behalf.

All parties in the Delegate Relationship will be able to monitor the status of the application and will be able to respond should a discrepancy exist.

Filing confirmation emails will be sent to the Primary Supervising Physician and Physician Assistant.

### Register the Delegate User

The delegate user must be a registered PALS account holder. If you do not have a PALS External Public account, please go to <https://www.pals.pa.gov/#/page/register> and register for a new account.

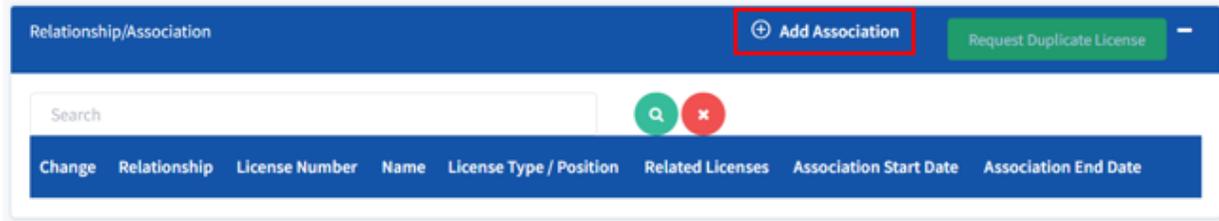


The screenshot shows the PALS website interface. At the top, there is a blue header with 'DEPARTMENT OF STATE'. Below it is an orange banner with the text 'COVID-19 Regulatory suspensions, updates, and g'. Underneath is a green banner with the text 'Participate in the 2020 U.S. Census to shape'. The main content area is divided into two columns. The left column is titled 'YOUR ACCOUNT' and contains a list of links: 'Register for a new account' (highlighted with a red box), 'Login to your account', 'Application Checklist', and 'PALS Help'. The right column is titled 'Welcome to the Pennsylvania Lic' and contains the text 'PALS can help you apply for, renew, and check your professi'. Below this is a section titled 'How do I get started?' with the text 'A good starting point is to use our [application checklist](#) to se your license.' and 'If this is your first time using PALS, [create an account](#) or if y logged in, your dashboard will provide you with clear next ste'.

The Primary Supervising Physician or Physician Assistant must initiate the Delegate User request from their respective PALS accounts. Either party can initiate the Delegate authorization.

## Log in as a Primary Supervising Physician or Physician Assistant

In the dashboard, navigate to the Relationship/Association section.

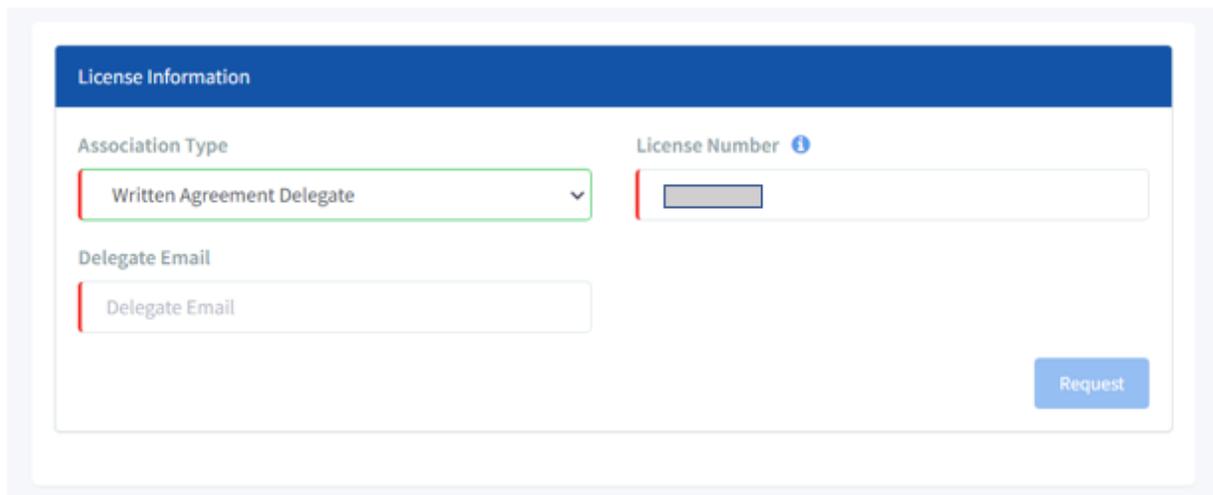


The screenshot shows the top navigation bar of the 'Relationship/Association' section. On the right side, there is a blue button labeled '+ Add Association' and a green button labeled 'Request Duplicate License'. Below the navigation bar is a search bar with the placeholder text 'Search' and two circular icons (a green one with a magnifying glass and a red one with an 'x'). Below the search bar is a blue navigation menu with the following items: 'Change', 'Relationship', 'License Number', 'Name', 'License Type / Position', 'Related Licenses', 'Association Start Date', and 'Association End Date'.

Click on 

Select Association Type as **'Written Agreement Delegate'**. The license number will be prepopulated for the respective account. However, if the licensee holds multiple license numbers with the same login (ex: Physician Assistant under both the Medical and Osteopathic Boards), the license number will not be prepopulated. The licensee will need to manually enter the correct license number. Enter the email address that the Delegate User used to register for their PALS account. The delegate user must be a registered PALS account holder.

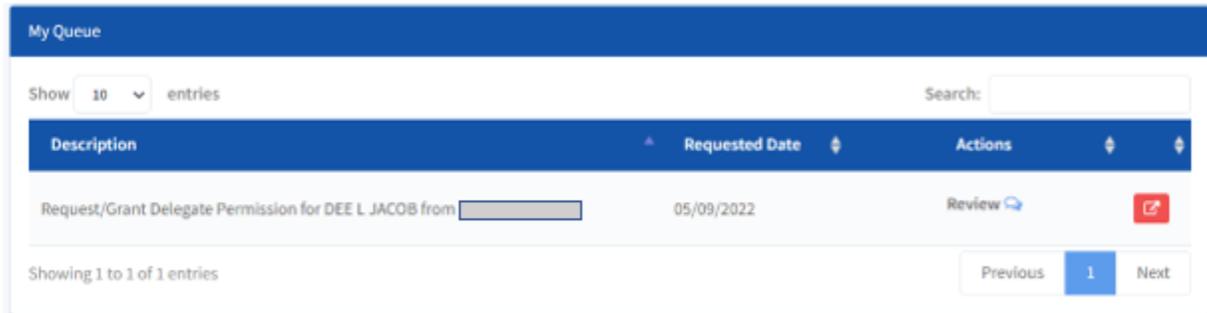
Click on **[Request]**



The screenshot shows the 'License Information' form. It has a blue header with the text 'License Information'. Below the header, there are three input fields: 'Association Type' with a dropdown menu showing 'Written Agreement Delegate', 'License Number' with a text input field, and 'Delegate Email' with a text input field. A blue 'Request' button is located at the bottom right of the form.

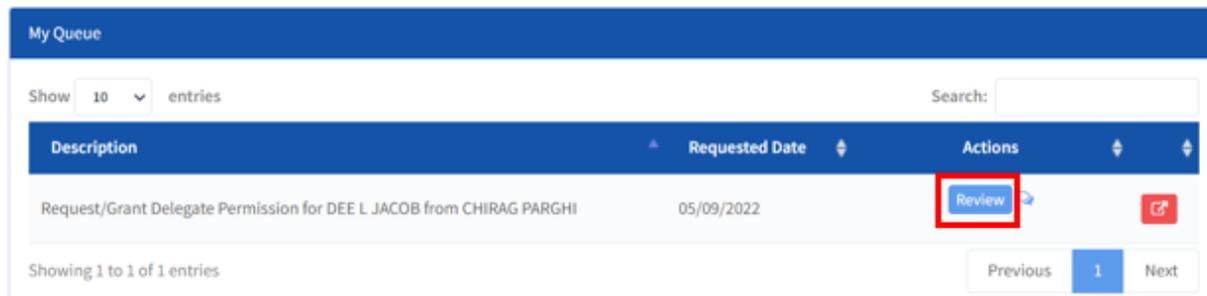
An email will be sent from [RA-STPALSNOTIFY@pa.gov](mailto:RA-STPALSNOTIFY@pa.gov) to the Delegate User to log into their PALS dashboard and approve the request.

Once the request is sent from Supervising Physician or Physician Assistant, the request can be seen under the 'My Queue' section on the Supervising Physician's or Physician Assistant's Dashboard page.



### Log in as the Delegate User

The PALS Delegate User will need to log into their PALS dashboard. Scroll down and navigate to the 'My Queue' section. Click on **[Review]**



Enter the Delegate User Electronic Signature and click on **[Approve]**

Type : Written Agreement Delegate

License Number :

Delegate Email : Jacoblee01@g.com

Signature: Delegate User Sign

Date: 05/09/2022

Comment :

Approve Reject Close

Once the Delegate user approves the delegate request received from the Supervising Physician or Physician Assistant, the Relationship/Association section will be enabled in the dashboard.

The relationship will be created between the Supervising Physician or Physician Assistant and the delegate user as a Written Agreement Delegate relationship.

| Change | Relationship               | License Number       | Name                 | License Type / Position       | Related Licenses | Association Start Date | Association End Date |
|--------|----------------------------|----------------------|----------------------|-------------------------------|------------------|------------------------|----------------------|
|        | Written Agreement Delegate | <input type="text"/> | <input type="text"/> | Medical Physician and Surgeon |                  | 5/10/2022              |                      |

Now, the delegate user can initiate a request to the other licensee that will be involved in the written agreement by clicking on 

Select Association Type as **'Written Agreement Delegate'**. Enter the License number of the Supervising Physician or Physician Assistant. The Delegate user's email address will be prepopulated in the Delegate Email field.

Click on **[Request]**

The screenshot shows a form titled "License Information" with a blue header. It contains three input fields: "Association Type" with a dropdown menu showing "Written Agreement Delegate", "License Number" with a text input field containing "License Number", and "Delegate Email" with a text input field containing "Jacoblee01@g.com". A blue "Request" button is located at the bottom right of the form.

Once the request is sent from the Delegate User, the request can be seen under the **'My Queue'** section in the Delegate User Dashboard page.

The screenshot shows the "My Queue" section with a blue header. It includes a "Show 10 entries" dropdown, a search bar, and a table with the following data:

| Description   | Requested Date | Actions  |
|---|----------------|--|
| Request/Grant Delegate Permission for DEE L JACOB from [redacted] | 05/10/2022     | Review  |

Below the table, it says "Showing 1 to 1 of 1 entries" and has "Previous", "1", and "Next" navigation buttons.

**Log in as a Primary Supervising Physician or Physician Assistant**

An email will be sent from [RA-STPALSNOTIFY@pa.gov](mailto:RA-STPALSNOTIFY@pa.gov) to the Primary Supervising Physician or Physician Assistant to log into their PALS dashboard and approve the request.

Scroll down and navigate to the 'My Queue' section. The review button will be enabled for the receiver. Click on **[Review]**

My Queue

Show  entries Search:

| Description   | Requested Date | Actions  |
|---|----------------|--|
| Request/Grant Delegate Permission for DEE L JACOB from <input type="text"/> | 05/10/2022     | <span style="border: 2px solid red; padding: 2px;">Review</span>   |

Showing 1 to 1 of 1 entries Previous  Next

Enter the Electronic Signature and click on **[Approve]**

Type : Written Agreement Delegate
✕

License Number : MA058036

Delegate Email : Jacoblee01@g.com

Signature

PA Sign|

Date

05/10/2022

Comment :

Comment

Approve

Reject

Close

Once the Primary Supervising Physician or Physician Assistant approves the request received from the Delegate User, the relationship will be created between the Supervising Physician, Physician Assistant, and the delegate user as a Written Agreement Delegate relationship.

| Change | Relationship               | License Number | Name        | License Type / Position | Related Licenses | Association Start Date | Association End Date |
|--------|----------------------------|----------------|-------------|-------------------------|------------------|------------------------|----------------------|
|        | Written Agreement Delegate |                | DEE L JACOB |                         |                  | 5/10/2022              |                      |

### Log in as the Delegate User

Log in as the Delegate User and navigate to the Relationship/Association section. The two active relationships can be seen in all three dashboards under the Relationship/Association section with a **Written Agreement Delegate** as the relationship type.

Please note that until each party in the relationship logs into PALS and completes their portion of the request, the delegate cannot initiate an application on the licensee's behalf.

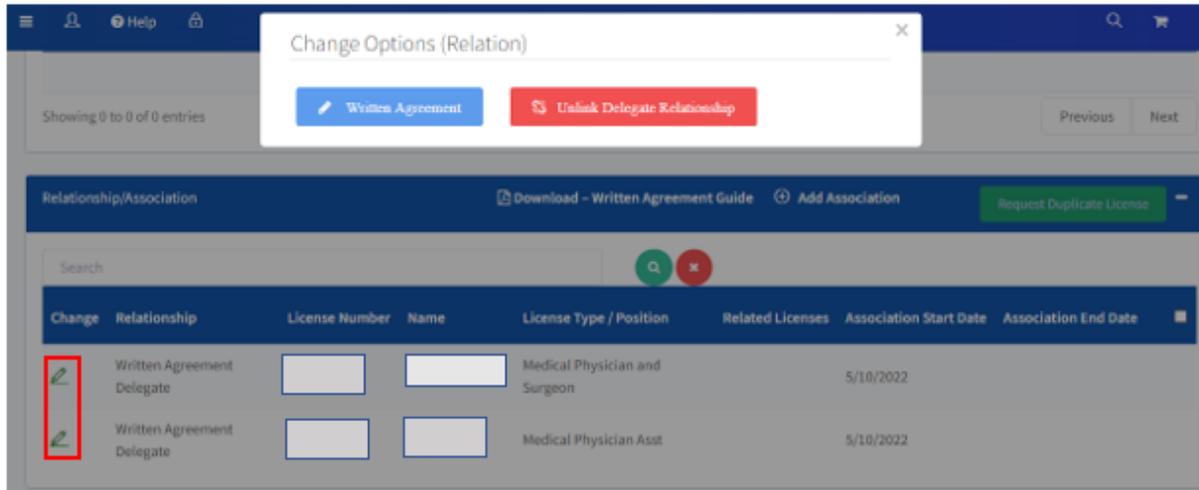
| Change | Relationship               | License Number | Name | License Type / Position       | Related Licenses | Association Start Date | Association End Date |
|--------|----------------------------|----------------|------|-------------------------------|------------------|------------------------|----------------------|
|        | Written Agreement Delegate |                |      | Medical Physician and Surgeon |                  | 5/10/2022              |                      |
|        | Written Agreement Delegate |                |      | Medical Physician Asst        |                  | 5/10/2022              |                      |

### Submitting an Initial Written Agreement

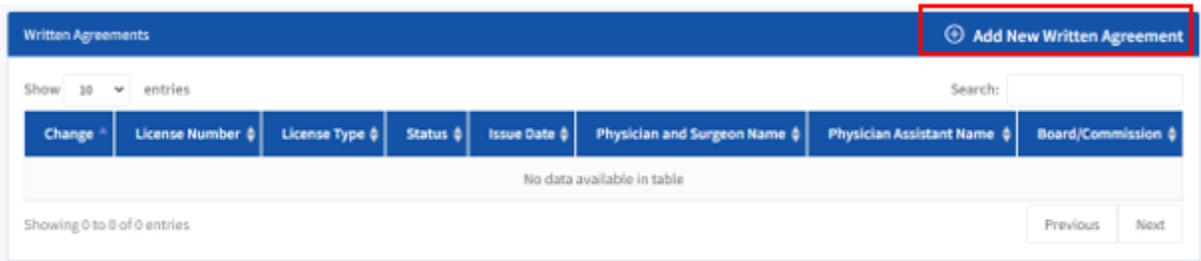
To submit an Initial Written Agreement on behalf of a Primary Supervising Physician or Physician Assistant, scroll to the Relationship/Association section.

Click on the pencil icon located in front of the Primary Supervising Physician or the Physician Assistant Written Agreement Delegate Relationship. Two options will be displayed – **Written**

## Agreement and Unlink Delegate Relationship



By clicking on [**Written Agreement**] a pop-up page will display.



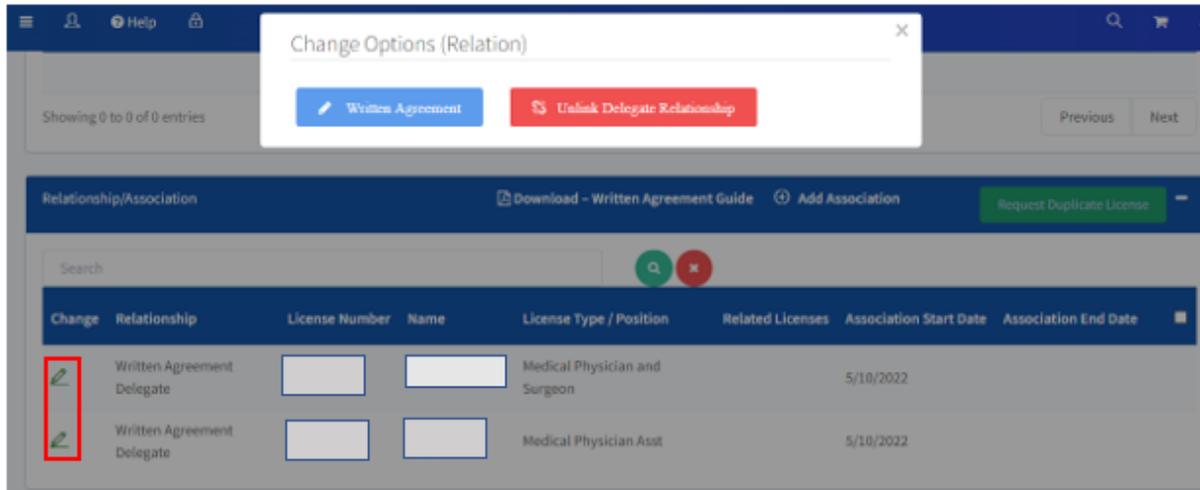
Click on the [**Add New Written Agreement**] button to submit the Initial Written Agreement form for the Primary Supervising Physician and Physician Assistant.

The Delegate User can only enter the license number of a Primary Supervising Physician and Physician Assistant who show in their dashboard as having a Written Agreement Delegate relationship.

### Submitting a Change of Written Agreement

To submit a Change of Written Agreement form on behalf of a Primary Supervising Physician or Physician Assistant, scroll to the Relationship/Association section.

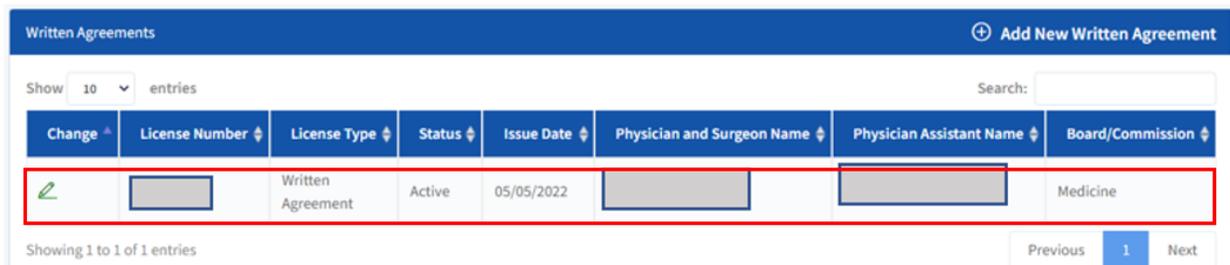
Click on the pencil icon located in front of the Primary Supervising Physician or the Physician Assistant Written Agreement Delegate Relationship. Two options will be displayed – **Written Agreement** and **Unlink Delegate Relationship**



By clicking on [**Written Agreement**] a pop-up page will display.

The page displays a grid of the existing written agreements for those licensees that have a Written Agreement Delegate Relationship.

Click on the pencil icon to submit the change of written agreement form.



**To Unlink the Delegate Relationship:**

Unlink functionality can be initiated at any time by the Primary Supervising Physician, the Physician Assistant, or the Delegate User.

Approval is not needed from the Primary Supervising Physician or Physician Assistant prior to the delegate requesting termination of the relationship.

Regardless of the application status (saved, in cart, submitted, or completed) all applications will be removed from the delegate dashboard once the delegate relationship is terminated.

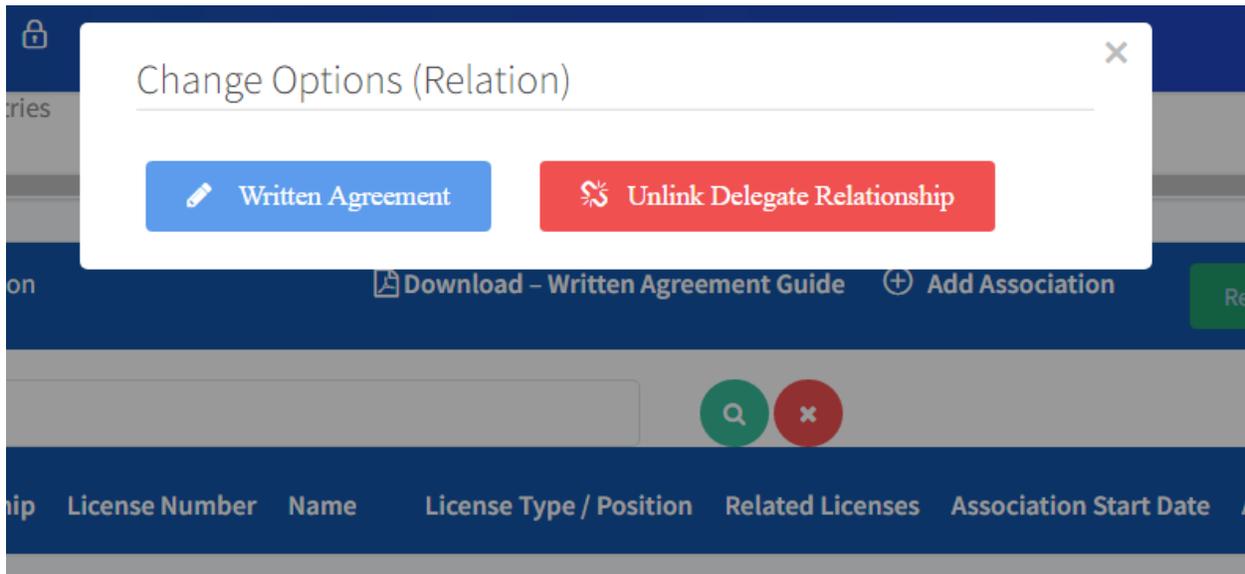
From the Licensee/Delegate User Dashboard, click on the pencil icon under the change column beside the 'Written Agreement Delegate.'

Relationship/Association Download - Written Agreement Guide Add Association Request Duplicate License

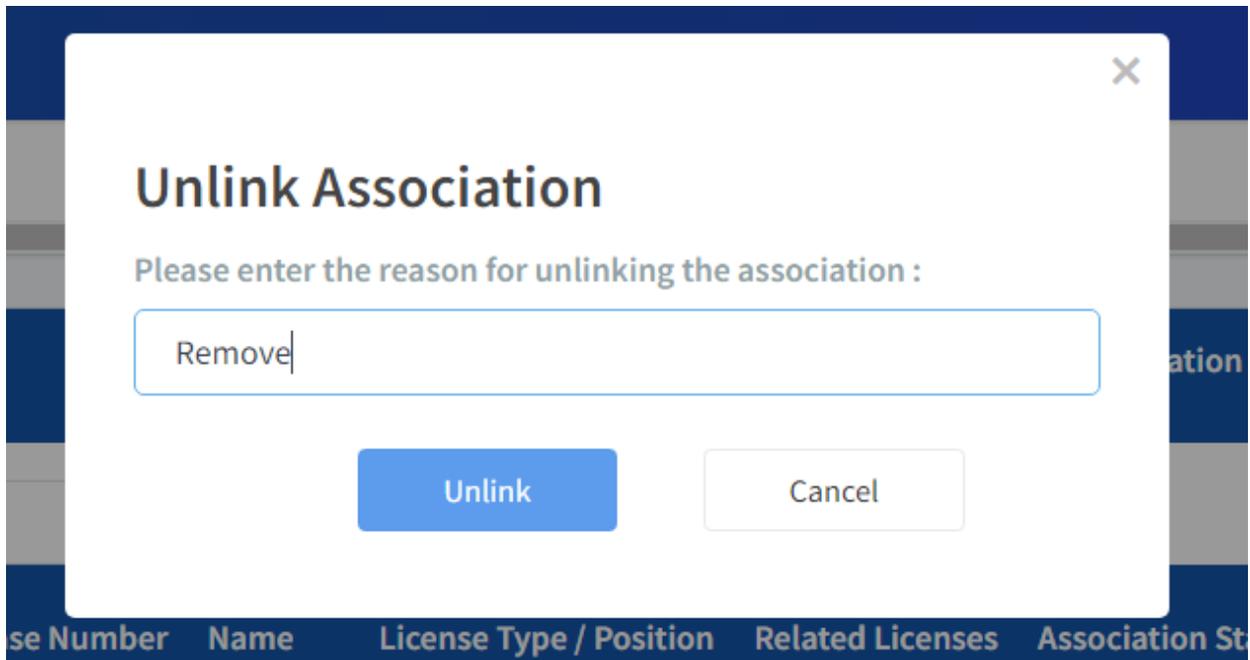
Search

| Change | Relationship               | License Number       | Name                 | License Type / Position       | Related Licenses | Association Start Date | Association End Date |
|--------|----------------------------|----------------------|----------------------|-------------------------------|------------------|------------------------|----------------------|
|        | Written Agreement Delegate | <input type="text"/> | <input type="text"/> | Medical Physician and Surgeon |                  | 5/10/2022              |                      |
|        | Written Agreement Delegate | <input type="text"/> | <input type="text"/> | Medical Physician Asst        |                  | 5/10/2022              |                      |

Click on **[Unlink Delegate Relationship]** to terminate the delegate relationship.



Enter the reason and click **[Unlink]**



Once unlinked, the pencil icon will be removed, and the association end date will automatically be entered by the system.

A screenshot of a web application interface showing a table of "Relationship/Association" data. The table has columns for "Change", "Relationship", "License Number", "Name", "License Type / Position", "Related Licenses", "Association Start Date", and "Association End Date". The "Association End Date" column for the first row is highlighted with a red box. The first row shows a "Written Agreement Delegate" relationship for a "Medical Physician and Surgeon" starting on 5/10/2022 and ending on 5/10/2022. The second row shows a "Written Agreement Delegate" relationship for a "Medical Physician Asst" starting on 5/10/2022. A pencil icon is visible in the "Change" column for the second row.

| Change | Relationship               | License Number | Name | License Type / Position       | Related Licenses | Association Start Date | Association End Date |
|--------|----------------------------|----------------|------|-------------------------------|------------------|------------------------|----------------------|
|        | Written Agreement Delegate |                |      | Medical Physician and Surgeon |                  | 5/10/2022              | 5/10/2022            |
|        | Written Agreement Delegate |                |      | Medical Physician Asst        |                  | 5/10/2022              |                      |