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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 dashboard. At the top, there is a blue header with 'DEPARTMENT OF STATE'. Below that 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 four blue buttons: '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



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request from their respective PALS accounts. Either party can initiate the Delegate authorization.



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Log in as a Primary Supervising Physician or Physician Assistant

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

Relationship/Association + Add Association Request Duplicate License

Search Q *

Change Relationship License Number Name License Type / Position Related Licenses Association Start Date Association End Date

Click on + Add Association

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]**

License Information

Association Type License Number

Written Agreement Delegate

Delegate Email

Delegate Email

Request

An email will be sent from 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



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Dashboard page.

The screenshot shows the 'My Queue' section of a dashboard. At the top, there is a blue header with the text 'My Queue'. Below the header, there is a search bar and a dropdown menu set to '10 entries'. A table with the following columns: 'Description', 'Requested Date', and 'Actions'. The table contains one entry: 'Request/Grant Delegate Permission for DEE L JACOB from [redacted]' with a 'Requested Date' of '05/09/2022'. The 'Actions' column for this entry contains a 'Review' button with a blue arrow icon and a red square icon with a white document symbol. Below the table, it says 'Showing 1 to 1 of 1 entries'. At the bottom right, there are navigation buttons: 'Previous', '1' (highlighted in blue), and 'Next'.

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]**

This screenshot is identical to the one above, but the 'Review' button in the 'Actions' column of the table is highlighted with a red rectangular box.

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



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The screenshot shows a modal form with the following fields and controls:

- Type: Written Agreement Delegate
- License Number:
- Delegate Email: Jacoblee01@g.com
- Signature: Delegate User Sign
- Date: 05/09/2022
- Comment:
- Buttons: Approve (green), Reject (red), Close (white)

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.

The screenshot shows the 'Relationship/Association' dashboard with the following table:

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 **+ Add Association**

Select Association Type as **'Written Agreement Delegate'**. Enter the License number of the



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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 placeholder "License Number" and an information icon, and "Delegate Email" with the pre-filled value "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 of a dashboard. It features a search bar and a "Show 10 entries" dropdown. Below is a table with the following data:

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

At the bottom, 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 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]**



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My Queue

Show entries Search:

Description	Requested Date	Actions
Request/Grant Delegate Permission for DEE L JACOB from <input type="text"/>	05/10/2022	Review

Showing 1 to 1 of 1 entries Previous **1** Next

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

Type : Written Agreement Delegate

License Number : MA058036

Delegate Email : Jacoblee01@g.com

Signature Date

Comment :

Approve Reject Close



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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		DEEL 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	



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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**

The screenshot shows a web application interface. At the top, there is a navigation bar with a menu icon, a user profile icon, a help icon, and a lock icon. Below the navigation bar, there is a search bar and a 'Showing 0 to 0 of 0 entries' message. A 'Change Options (Relation)' pop-up window is open, displaying two buttons: 'Written Agreement' (blue) and 'Unlink Delegate Relationship' (red). Below the pop-up, there is a table with columns: Change, Relationship, License Number, Name, License Type / Position, Related Licenses, Association Start Date, and Association End Date. The table contains two rows, both with a pencil icon in the 'Change' column, indicating they are selected for editing.

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	

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

The screenshot shows the 'Written Agreements' page. At the top right, there is a blue button labeled 'Add New Written Agreement'. Below the button, there is a search bar and a 'Showing 0 to 0 of 0 entries' message. A table with columns: Change, License Number, License Type, Status, Issue Date, Physician and Surgeon Name, Physician Assistant Name, and Board/Commission is displayed. The table is currently empty, with the message 'No data available in table' centered below it.

Change	License Number	License Type	Status	Issue Date	Physician and Surgeon Name	Physician Assistant Name	Board/Commission
No data available in table							

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.

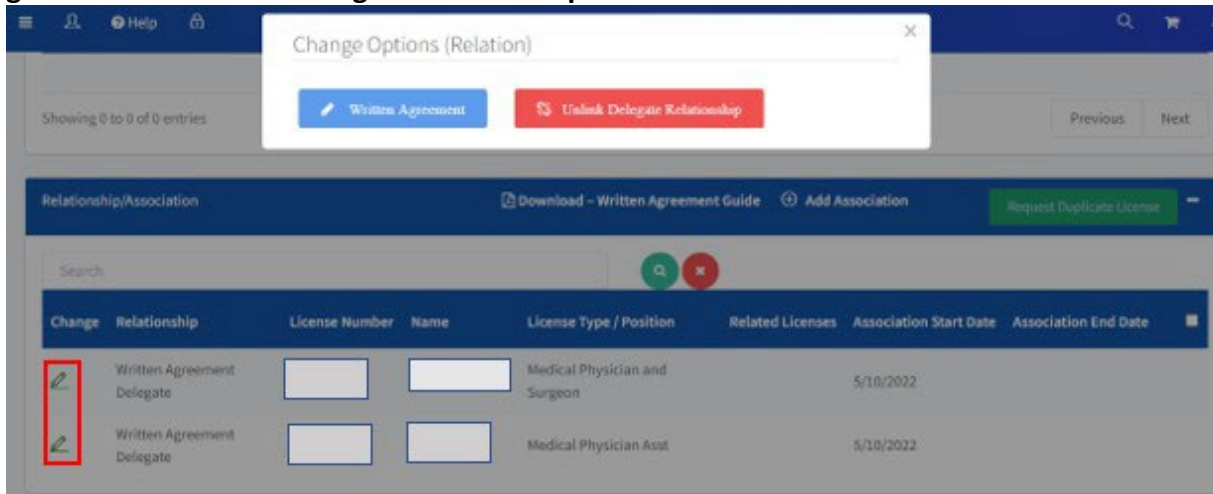


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Submitting a Change of Written Agreement

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

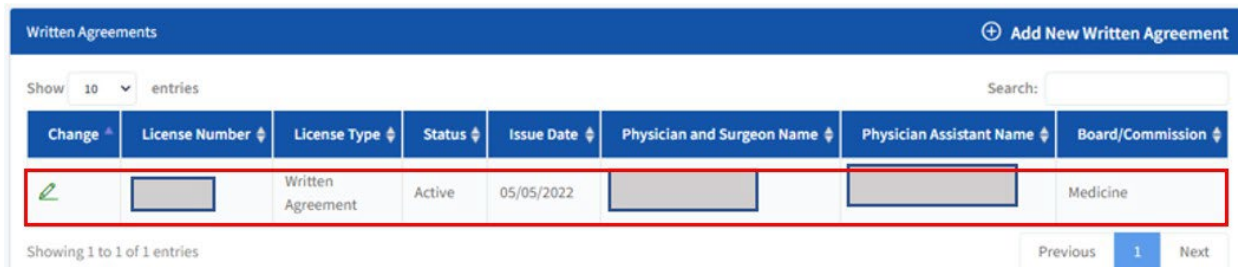
Click on the pencil icon located in front of the Primary Supervising Physician or the Physician Assistant Written Agreement Delegate Relationship. Two options will be displayed – **Written Agreement** and **Unlink Delegate Relationship**



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.





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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.

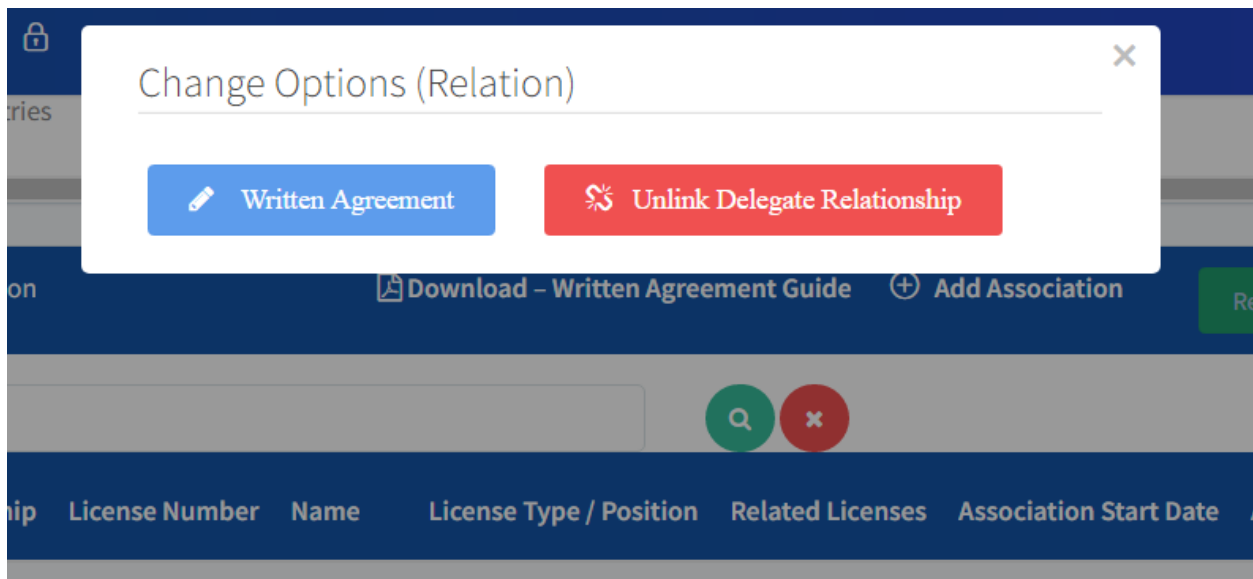
From the Licensee/Delegate User Dashboard, click on the pencil icon under the change column beside the 'Written Agreement Delegate.'



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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]**



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Unlink Association

Please enter the reason for unlinking the association :

License Number	Name	License Type / Position	Related Licenses	Association Start
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Once unlinked, the pencil icon will be removed, and the association end date will automatically be entered by the system.

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	