LIBTAYO SURROUND®

Frequently asked questions:

Provider Portal and
Patient Enrollment
Tracking

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The LIBTAYO Surround
Provider Portal

is an online resource that enables practices to enroll, track, and manage patients in one convenient place.

Visit **LIBTAYOSurroundPortal.com** to access the portal

After an Enrollment Form has been submitted, the patient's enrollment status may be tracked either from within the Provider Portal or through a separate website, **Patient Enrollment Tracking**.

Refer to the appropriate section(s) of this guide if you have questions about the portal or patient enrollment tracking.

Please note that the portal user experience may vary if using a mobile device; however, the available content is the same.

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Provider Portal FAQs

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General

☑ **What is the LIBTAYO Surround Provider Portal?**

- The Provider Portal is an online resource that HCP offices can utilize when requesting LIBTAYO Surround services. It offers a way to enroll, track, and manage patients from an easy-to-access website, **LIBTAYOSurroundPortal.com**
- The Provider Portal is a secure website, accessible only to HCPs or their designated office staff/reimbursement personnel who participate in the LIBTAYO Surround program on behalf of patients in their practice. It enables users to:
  - Digitally enroll patients in LIBTAYO Surround
  - Access participating patient case histories
  - Send and receive secure messages to and from the LIBTAYO Surround team
  - View LIBTAYO Surround documents

☑ **Who can use the Provider Portal?**

All HCPs, or their designated office staff/reimbursement personnel, with patients eligible for or enrolled in LIBTAYO Surround may utilize the portal after their registration has been verified.

Registration and login

☑ **Why do I have to register for the Provider Portal?**

Registration is a security measure to ensure that only authorized individuals have access to information about your patients and cases. The registration process verifies that the requester is authorized to have access to practice, location, physician, and patient data.

☑ **How do I add an organization?**

- You can request to be added to a new organization via the secure messaging feature
- Authorized users within an organization can invite you to join their organization via the *Invite a Member* button located on the *Office Affiliation* page

☑ **Will an office with multiple providers or office staff members have to register for separate Provider Portal accounts?**

- Yes. To maintain the security of patient data, providers and office staff members must register individually for a Provider Portal account. To streamline registration, authorized users can invite new providers or office staff members through *Invite a Member* located on the *Office Affiliation* page
- Once a user is invited, they will receive a communication with a link to register for the portal, which will automatically verify the new user for quicker registration and access to the Provider Portal

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HCP=healthcare provider.

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Provider Portal FAQs (cont'd)

Registration and login (cont'd)

☑ **How many office staff members can enroll?**

There is no limit.

☑ **How long does it take for a new member/physician to be added to or deleted from the portal?**

- If you are a new user being added to a new organization (no facility ID entered during registration), you will have to be manually verified by the LIBTAYO Surround Reimbursement Specialist. The request will be reviewed within 1 business day. If a provider registers via the portal or is invited from an existing organization, they are automatically enrolled and do not need to be manually verified. Hence, they are able to sign up and create an account immediately

- If a user wishes to remove someone from their organization, the prescriber can disable portal access immediately. If this request occurs via secure message, the LIBTAYO Surround Reimbursement Specialist will complete the request within 1 business day

☑ **How do I log in to the Provider Portal?**

Users should navigate to the Provider Portal *Log In* page, **LIBTAYOSurroundPortal.com**, and enter the email and password associated with their account. If the user has not yet created an account, they may begin registering by clicking the *Register* button from the *Log In* page.

☑ **What should I do if I forgot my login information or my password does not work?**

- Users may click the *Forgot password?* link on the *Log In* page to perform a password reset if they forgot their login information or their password does not work. Once on the *Reset Password* page, users may enter the email address associated with their account to receive an email communication to complete the password reset

- If no email is received or login issues persist, please contact LIBTAYO Surround or your local Reimbursement Manager

☑ **Why are some of the password requirements complex?**

This ensures that all patient-specific information is not easily accessible.

To create your unique password, follow these requirements and include:

- At least 8 characters
- A lowercase letter
- An uppercase letter
- A number
- A symbol
- No parts of your username

Note: For password reset, your password cannot be any of your last 10 passwords.

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Provider Portal FAQs (cont'd)

Registration and login (cont'd)

☑ **Can an office deactivate a Provider Portal user's account or delete a user if they leave the practice?**

- A user logged in as a Prescriber user type may deactivate any associated office staff member's portal account from the *Office Affiliation* page. On this page, in the associated office staff member's table, a prescriber may click the *Delete Portal Account* button located to the right of the office staff member's account details. Once the office staff member's name has been deleted, their account information will no longer be visible to any associated users from the *Office Affiliation* page

- A user logged in as an Office Staff user type may contact LIBTAYO Surround through the secure messaging feature and use the subject "Remove a user from an organization." LIBTAYO Surround will contact you to confirm which user should be removed from the organization

☑ **How do I cancel/delete my organization's account?**

A request has to be made to be removed from an organization by clicking on the envelope icon at the top-right corner and sending a secure message.

☑ **Can a user share login information or must each user create a personal login?**

Every user must have their own account.

☑ **What if I input incorrect registration information?**

If you input incorrect registration information, contact LIBTAYO Surround or your local Reimbursement Manager.

☑ **Do I need to include the Physician NPI number?**

Yes.

☑ **Can all the practice locations register to use the portal?**

Yes.

☑ **How do I provide missing information when I've received a message that something is missing?**

You will need to contact your LIBTAYO Surround Reimbursement Specialist by phone or via the secure messaging feature on the portal. Attachments can be also shared using this feature.

NPI=National Provider Identifier.

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Provider Portal FAQs (cont'd)

Provider Portal records

☑ **Who will have access to my patient's records?**

Users with the Office Staff user type may view data for all patients associated with their affiliated organizations/practices. Users with the Prescriber user type may view data for all their associated patients.

User profile and messaging

☑ **How do I update my notification preferences?**

Users will be regularly alerted to case-related updates via the notification bell in the top navigation menu of the portal. While the bell notifications cannot be turned on/off, users may adjust their communication preferences.

- To adjust their communication preferences, users may simply click the *Profile* dropdown in the top-right corner of the portal webpage and select *Account Profile*. From there, users may click *Edit* and change the communication preference to either *Email*, *SMS*, or *None*. In addition, users may change the communication frequency to either *Daily*, *Weekly*, or *None*. Once changes are completed, users may click *Save* to finalize their preferences

☑ **How do I request a new office affiliation?**

- Users can be added to a new office by other prescribers or office staff members associated with that office by clicking on the *Invite a Member* button. Once a prescriber or office staff member associated with the office has entered the authorized user's information, the user will be automatically associated with the new office and notified of the addition
- If a user seeks to individually request a new office affiliation or add a new office, they may send a secure message to LIBTAYO Surround with this request

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SMS=Short Message Service.

Provider Portal FAQs (cont'd)

User profile and messaging (cont'd)

☑ **How do I remove an office affiliation?**

If a user seeks to remove an office affiliation for themselves or another user, they may contact LIBTAYO Surround by sending a secure message through the portal and sharing details using the subject "Remove a user from an organization".

☑ **How do I add a staff member/physician?**

- Users can be added to a new office by other prescribers or office staff members associated with that office using *Invite a Member*. Once a prescriber or office staff member associated with the office has entered the authorized user's information, the user will be automatically associated with the new office and notified of the addition
- If a user seeks to individually request a new office affiliation or add a new office, they may send a secure message to LIBTAYO Surround with this request

☑ **How do I compose a secure message? Who are the recipients?**

- Users may compose a secure message to LIBTAYO Surround from the Provider Portal in a variety of ways. To initiate a new message or inquiry, users may click the envelope icon in the top navigation bar and select *New Message*, or click the *New Message* button located within a patient's profile page. When composing a new message, users have the option to search for and select the patient they are inquiring about, select a subject for the message, and input message details to send
- Alternatively, users may click the envelope icon and select *View All* to view ongoing or completed message threads, as well as any new messages that may have been received. When a user clicks into a message thread, they may choose to respond within the thread itself from the *Messages* page as well as upload documentation
- When you compose a message, you're interacting with the LIBTAYO Surround team

Contacting support

☑ **Who should I contact for technical assistance or suggestions for enhancements to the portal?**

Please contact LIBTAYO Surround or your local Reimbursement Manager.

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Provider Portal FAQs (cont'd)

My patients

What is the *My Patients* list?

The *My Patients* list provides a high-level list of patients (under the practice's care) who are enrolled in LIBTAYO Surround. Visibility into patients differs by user type. Prescribers may view all their associated patients, and office staff members may view all patients associated with their affiliated organizations/practices.

How do I enroll my patient?

- There are multiple pathways via the portal to enroll a patient. Users can click the *Enroll a Patient* button (at the top of most pages in the portal) or select the patient button in the portal's navigation banner
- If you are attempting to access the digital Enrollment Form from outside the portal, you can go to **SurroundEnrollment.com**. Alternatively, there is a link on the *Enrollment* page of **LIBTAYOSurround.com**

Are enrollments instant or do they need to be processed?

An enrollment request is submitted immediately, but it needs to be reviewed by a LIBTAYO Surround Reimbursement Specialist for the patient's enrollment journey to begin.

How can I view documents relating to my patients?

Users may access patient documents by navigating to the patient's profile and viewing the shared documents located on the bottom-right side of the page. Users may scroll to view a full list of shared documents, and preview or download patient documents submitted to and sent from LIBTAYO Surround.

Do I need to complete another enrollment if the patient's insurance changes?

No, you can simply send the new insurance information through secure messaging.

Can I update patient information if it is incorrect?

You will need to contact your LIBTAYO Surround Reimbursement Specialist by phone or through secure messaging on the portal as patient data cannot be modified via the portal.

Where can I find the Benefits Investigation provided?

A provider can navigate to the *Patient Profile* page to view their patient's Benefits Investigation information. To access this page, a portal user can go to the *Patient List* page and search the patient's name. Once the patient is identified, the provider can click on the patient's name to access the *Patient Profile* page.

Can I see if a copay claim has been paid?

If a patient is enrolled in the LIBTAYO Surround Commercial Copay Program, a provider can navigate to the *Patient Profile* page to view their patient's claims information at the bottom of the page. To access this page, a portal user can go to the *Patient List* view and search the patient's name if they exist in the organization.

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Provider Portal FAQs (cont'd)

My patients (cont'd)

Will I get updates on PAP vial shipments through the portal?

If a user is interested in receiving patient case notifications, they have the option to select a communication preference and communication frequency on the *Account Profile* page. All patient case update notifications will appear at the notification bell in the portal regardless of communication preference.

Can I see patients associated with more than 1 provider?

A user logged in as an Office Staff user type will be able to see patients associated with affiliated provider(s). A user logged in as a Prescriber user type will only be able to see their associated patients.

Do I see all patients in the practice or just the ones associated with my NPI number?

If you are a prescriber, you will be able to view patients associated with you. If you are an office staff member, you will be able to see patients associated with your organization(s).

SMS messaging

Why am I being asked to provide the treating site ZIP code and last 4 digits of the prescriber's National Provider Identification (NPI) number?

This is a security measure to ensure that only authorized individuals have access to information about your patients and cases. The registration process verifies that the requester is authorized to access practice location, physician, and patient data.

What if I do not have an NPI number?

The affiliated prescriber's NPI number that was entered during registration should be used.

I have multiple providers and/or treating site locations. How do I know which treating site ZIP code and affiliated prescriber NPI number to use?

For multiple office locations, the initial treatment site that was listed on the LIBTAYO Surround Enrollment Form should be used. For multiple providers, the affiliated prescriber's NPI number that was entered during registration should be used. If you have any questions, please contact LIBTAYO Surround or your local Reimbursement Manager.

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PAP=patient assistance program.

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Provider Portal FAQs (cont'd)

SMS messaging (cont'd)

☑ **What happens if I cannot get past the treating site ZIP code and the last 4 digits of the affiliated prescriber's NPI number screen?**

Please contact LIBTAYO Surround or your local Reimbursement Manager.

☑ **Why do I keep being asked to enter the treating site ZIP code and the last 4 digits of the affiliated prescriber's NPI number?**

This information will be required when our system does not recognize the device. New devices or devices that use a private browser—eg, incognito mode—will prompt our system to continue to send these questions. This is to help ensure that your patient's health information is protected.

☑ **How do I sign up for SMS messages?**

If you are already registered, you can select SMS messaging within your communication preferences in the portal. If you are registering for the portal, you can select SMS messaging as your communication preference.

☑ **How do I opt out of receiving SMS messages?**

You can text "STOP" to be removed from all future SMS messages, or you can update your communication preferences within the portal.

☑ **What information should the prescriber know when they receive an SMS message to sign an Enrollment Form?**

When the prescriber receives the SMS message to sign the Enrollment Form, they will be asked for the treating site's ZIP code and the last four digits of their NPI number.

☑ **I am getting too many patient case notification SMS messages. Can I update the frequency?**

Yes, you can update the SMS message frequency from daily to weekly.

☑ **Am I able to have a patient or prescriber sign at the office?**

Yes, you will be prompted to have the prescriber and patient sign the form prior to submission.

☑ **Am I able to have a patient or prescriber sign the Enrollment Form if they are not in the office?**

Yes, you can request that the prescriber and/or patient signs the Enrollment Form either via email or SMS link.

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Provider Portal FAQs (cont'd)

Provider profile

☑ **How do I edit my profile?**

Account information can be modified on the *Account Profile* page.
This page is available by clicking on the profile icon in the top-right corner of the portal. From there, users may click *Edit* and make necessary changes. Once changes are completed, users may click *Save* to finalize their information.

☑ **How do I provide missing information when I've received a message that something is missing?**

You will need to contact your LIBTAYO Surround Reimbursement Specialist by phone or via secure messaging on the portal. Attachments can be shared via this feature.

Patient Enrollment Tracking FAQs

After an Enrollment Form has been submitted, the patient's enrollment status may be tracked from within the Provider Portal.* Alternatively, you can use the Patient Enrollment Tracking website, **SurroundTracking.com**, where you will not need to log in to (or register for) the Provider Portal to view your patient's enrollment status. Refer to the following section if you have questions about enrollment tracking via **SurroundTracking.com**.

Patient Enrollment Tracking FAQs

☑ **Where do I find my patient's Patient ID number or Enrollment ID number?**

Once the Enrollment Form has been submitted, you will receive a confirmation email that displays the ID number. You will also receive a fax that shows the Patient ID number. If you lose either ID number or are unsure of it, you can contact LIBTAYO Surround or your local Reimbursement Manager.

☑ **What if my patient's Patient ID number or Enrollment ID number doesn't match an existing record?**

Please check the Patient ID number or Enrollment ID number and try again. Alternatively, you can contact LIBTAYO Surround or your local Reimbursement Manager.

☑ **What does "Enrollment Submitted and Pending Review" mean?**

This means we have received the enrollment and are working on reviewing the benefits and enrolling the patient into any applicable financial support programs.

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*In the Provider Portal, enrollment status can be checked by navigating to the Patient List and clicking on the patient's name.

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Patient Enrollment Tracking FAQs (cont'd)

Patient Enrollment Tracking FAQs (cont'd)

☑ **How long does it take for the enrollment to be reviewed?**

We aim to review the enrollment within 1 business day. Please note that we may need to reach out to you with clarifying questions.

☑ **Who should I contact for technical assistance or suggestions for enhancements to the Patient Enrollment Tracking site?**

Please contact LIBTAYO Surround or your local Reimbursement Manager.

For more information or if you have questions, contact your Reimbursement Manager or call LIBTAYO Surround at **1.877.LIBTAYO** (1.877.542.8296) **Option 1**, Monday–Friday, 8 AM–8 PM Eastern time.

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