Bureau of Professional and Occupational Affairs

State Boards of Medicine and Osteopathic Medicine

Job Aid for Written Agreement Initiated By Physician and Surgeon

Version 1.1
03-2021
## Written Agreement Initiated by Physician and Surgeon

These steps can be followed for Written Agreement applications initiated by Physician and Surgeons.

<table>
<thead>
<tr>
<th>Step No</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Go to <a href="https://www.pals.pa.gov">https://www.pals.pa.gov</a> &lt;br&gt; Select Login</td>
</tr>
<tr>
<td>2.</td>
<td>The Supervising Physician will need to Log into PALS by entering their User ID and Password and clicking LOGIN. &lt;br&gt; a. The Dashboard screen will be displayed. &lt;br&gt; b. In the Professional License Details section, click on the green pencil icon next to your license number. &lt;br&gt; c. On the Change Options (License) pop-up, select Written Agreement.</td>
</tr>
</tbody>
</table>
3. The **WRITTEN AGREEMENT APPLICATION** page is displayed with the checklist items and Primary Supervisor Details. Click on the “Information Icon” to review the requirements for each of these checklist items.

4. Enter the Physician Assistant License number. **Note: This license number must be under the same Board as the supervising physician.** Press the **[Tab]** key on the keyboard. System will display the Physician Assistant details:
Written Agreement Initiated by Physician and Surgeon

5. Enter a Substitute Supervising License number and press the [Tab] key on the keyboard. **You do not need to list all substitute supervisors.** System will display the Substitute Supervising details:

   **SUBSTITUTE SUPERVISING LICENSE DETAILS:**

   Please enter the name and license number of a substitute supervisor:

   [Input field]

   [Input field]

   [Input field]

6. In the **QUESTIONS SECTION** complete all the questions

   **QUESTIONS SECTION:**

   Please provide the following information for questions below.

   Specialties of the Primary Supervisor:
   
   Urgent Care

   Will the physician assistant prescribe and dispense drugs/therapeutic devices?
   - Yes
   - No

   Will the physician assistant practice in a hospital and/or surgical center?
   - Yes
   - No

   Will you countersign 100% of the physician assistant’s patient records within the required 10-day period?
   - Yes
   - No

   Have you been registered as a substitute supervisor for the above identified physician assistant’s practice in the same specialty for at least six months and in patient records within the required 10-day period?
   - Yes
   - No

   You will need to enter in the text box provided the specific details regarding how you will select patient records for review and with what frequency, such as the percentage of patient charts, specific types or categories of patient cases, etc.

   [Input field]

   I affirm that the number of patient records reviewed shall be sufficient to assure adequate review of the physician assistant’s practice. Do not implement the new review plan.
### Written Agreement Initiated by Physician and Surgeon

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<th>WRITTEN AGREEMENT:</th>
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<td>Describe the functions/tasks to be delegated to the physician assistant.</td>
</tr>
<tr>
<td>Observation, Communication</td>
</tr>
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</table>

Provide the details describing the time, place and manner of supervision and direction you will provide to the physician assistant, including the:

During the Office Hours and in the Urgent Clinic:

Does the Primary Supervisor hold hospital or surgical center staff privileges?

- [ ] Yes  [ ] No

Enter the primary practice address:

123 State St

City: Harrisburg

State: Pennsylvania

Zip Code: 17101

Enter the primary practice telephone number:

888-888-8888

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7. **Click on the [SEND TO PHYSICIAN ASSISTANT] button**

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8. **User will be redirected to the Dashboard page. The application will be displayed under the Activities section:**
Written Agreement Initiated by Physician and Surgeon

9. In the **Dashboard** page, at the top left corner, click on the **Person** icon and then click on the **Logout** option:

![Dashboard page with highlighted Logout option](image)

The PALS website home page will be displayed. An email will be sent to the physician assistant advising them that you have initiated the application process.
Written Agreement Initiated by Physician and Surgeon

10. The Physician Assistant will need to Log into PALS by entering their User ID and Password and clicking LOGIN.
   a. The Dashboard screen will be displayed.
   b. Scroll to the My Queue section, click on the [Review] button

11. The WRITTEN AGREEMENT APPLICATION is displayed. Click on the “Information Icon” to review the requirements for each of the checklist items. Review the information in the application that has been completed by the supervising physician and surgeon. You cannot make edits to the information that the supervising physician has completed. If there are any errors, please contact the supervising physician. The supervising physician will need to make the corrections in the application and resend to you.

12. In the CONFIRMATION STATEMENT SECTION mark the ‘I CONFIRM’ check box and type your name in the Signature box
13. In the **Check List Documents** section, you will be required to upload current proof of malpractice insurance. Click on [Browse]

The **Choose File To Upload** message is displayed. Select the file and click on the [Open] button

14. In the **Upload documents** section, click on the [Upload] button

15. After uploading the required documents, click on the [Approve] button
Written Agreement Initiated by Physician and Surgeon

16. User will be redirected to the Dashboard page. The application will be displayed in the My Queue section as REVIEW AND SUBMIT TO BOARD

17. In the Dashboard page, at the top left corner, click on the Person icon and then click on the Logout option:

The PALS website home page will be displayed. The supervising physician will receive an email advising them that you have completed your portion of the application.
The Supervising Physician will need to Log into PALS by entering their User ID and Password and clicking LOGIN.

- The Dashboard screen will be displayed.
- Scroll to the My Queue section, click on the [REVIEW AND SUBMIT TO BOARD] button

The WRITTEN AGREEMENT APPLICATION is displayed

Scroll down to the VERIFICATION SECTION:

- Select the [Yes] radio button
- In the Signature box, type your name
20. Click on the [Submit] button

21. The Review Your Application page is displayed. Review the application and click on the [Add to Cart] button

22. In the Check Out page:
   a. Select the check box for the application
   b. Select the All fees are non-refundable checkbox
   c. Click on the [Proceed to Payment] button
23. In the **Payment** page, enter the payment details as prompted.

<table>
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<tr>
<th>Pay With Your Credit Card</th>
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<tbody>
<tr>
<td><strong>Cardholder Name:</strong></td>
</tr>
<tr>
<td><strong>Credit Card Number:</strong></td>
</tr>
<tr>
<td><strong>Expiry Date (MMYY):</strong></td>
</tr>
<tr>
<td><strong>Security Code:</strong></td>
</tr>
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</table>

24. Click on the **[Pay With Your Credit Card]** button

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<th><strong>ZIP/Postal Code</strong></th>
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<tbody>
<tr>
<td><strong>Country:</strong></td>
</tr>
<tr>
<td>United States</td>
</tr>
<tr>
<td><strong>Email:</strong></td>
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</table>

A confirmation email will be sent to this address.
25. The **Confirmation** page is displayed. Application number will be displayed in the **Payment Summary**.

26. **Click on the Dashboard icon on the top left side**
27. **User will be redirected to the Dashboard page.** The application will be displayed in the **Activities** section in the **Submitted** Status. The application will stay in the **Submitted** Status until it is evaluated by Board Staff.

28. **You will need to print a copy of the application that was submitted.** Expand the checklist by clicking on the plus sign next to the application number.

29. **Click on the download button next to the Application Checklist Item.**
30. You can follow the status of the application by logging into your dashboard and going to the Activities Section. If the application status indicates **Pending Review**, the application is pending review by Board Staff. If the status changes to **Need Action**, expand the checklist by clicking on the plus sign next to the application number. The items will be noted which indicate a discrepancy.

31. **Click on the Arrow to view the specific discrepancy.**
32. You will need to respond to the discrepancy by uploading supporting documents to answer the discrepancy.

33. In the Dashboard page, at the top left corner, click on the Person icon and then click on the Logout option:

The PALS website home page will be displayed.