DOH 329 Registry Patient Initiated Application

Detailed Instructions
For Certifying Physicians
Background

• On January 1, 2015, the Department of Health began managing the State’s Medical Marijuana Registry Program.

• As of January 1, 2015, the DOH Interim System was in place and applications were submitted partially online (entered by physicians or their staff) and partially via hard copies that were mailed to DOH.

• As of December 1, 2015, ALL applications will be handled electronically.

• Applications that were initiated and entered into the DOH Interim System prior to December 1, 2015, will continue to be accepted temporarily. All new applications must be submitted using the new Patient Application System in one of the following formats:
  – Patient Initiated Application
  – Physician Initiated Application

This training is for Patient Initiated Applications
Introduction

• Before you begin
  – Electronic Signature Agreement Form - REQUIRED
  – Link to MyPVL - REQUIRED

• First Time Access to medmj.ehawaii.gov

• Subsequent Access

• Patient Initiated Application – step by step process
Security Reminders

• Treat all files and uploaded documents (photocopies of IDs, signed documents) with the same care used for ALL medical records.

• Always protect your username and password.
Electronic Signature Agreement Form

• Certifying Physicians MUST complete the Electronic Signature Agreement form at http://health.hawaii.gov/medicalmarijuana/providers/application-procedure/ before using the new electronic system in order for DOH to accept their electronic signature.

• Please download the form, complete it on a computer (or type), print it out, sign it, date it, and return it to DOH. Electronic signatures on this form are NOT ACCEPTABLE. Mail completed form to: DOH, 4348 Waialae Avenue, #648, Honolulu, Hawaii 96816.
Link MyPVL

• Next, prior to accessing the Medical Marijuana Registry application system, you will need to link your Professional & Vocational Licensing (My PVL) account to the email address you plan to use for the Medical Marijuana Registry

• Follow the instructions here: http://health.hawaii.gov/medicalmarijuana/files/2014/11/Creating-a-MyPVL-Account-12-30-14-Revised-FINAL.pdf
First Time Access

The first time you go to the Medical Marijuana Registry web site, https://medmj.ehawaii.gov you will see the screen to the right and you will need to click the ‘Doctors, first time logging in?’ link in the upper right corner.

You will be taken to a different screen.
**First Time Access**

You will need to login using the same email address and password you currently use to access the Professional & Vocational Licensing site (MyPVL Renewal site: [https://pvl.ehawaii.gov/mypvl](https://pvl.ehawaii.gov/mypvl)) for your MD or DOS license. You will also need to input your PVL license # and your controlled substance #.

- Visit [https://pvl.ehawaii.gov/mypvl/docs/MyPVL%20Instructions.pdf](https://pvl.ehawaii.gov/mypvl/docs/MyPVL%20Instructions.pdf) for more information

If you have forgotten your PVL system password, you can use the ‘Forgot Password’ link to reset the password. A new password will be sent to the PVL email.
Subsequent Logins

After you have logged in the first time successfully, you can then log in with just your email & password at the main landing page:
https://medmj.ehawaii.gov
Patient Initiated Application

The next steps focus on adding information to a record for a patient that has entered their own electronic application and requires that the certifying physician enter **medical information only (this is where the physician certify’s the patient’s condition)** and may require the certifying physician to upload/attach required documents that the patient omitted.

**Note**: If you opened an application that was in your **Pending Queue** with a status of ‘Submitted by Patient’, follow these steps to finish the application and submit to DOH correctly.
Steps

1. Login and click on Pending Queue
2. Review Patient Data
3. Review Caregiver Data
4. Add Debilitating Medical Condition – this is where you indicate the condition that is being certified
5. Review Grow Site Data
6. If there are data entry errors, RETRUN to patient
7. Once all corrections are made and IF patient has not already done this:
   a) Download Required Documents – handwritten signatures required
   b) Upload Required Documents (certifications & ID)
8. Final Review before Submitting to DOH
9. Certify the Application – this is the equivalent of the physician’s signature page.
10. Review your Pending Queue daily for returns from DOH or new applications from patients
Step 1 – Click Pending Queue

Once you have logged into the Medical Marijuana System, click on the Pending Queue icon to review and complete a new patient application prior to submitting it to DOH.
Step 2 – Review Patient Data

Review the Patient information screen and check that information is correct. The patient name should exactly match their valid identification.

Note: For minor applicants, state ID is required if age 10 or older. If under 10, Birth Certificate is acceptable.

The box should be checked if the patient is an adult lacking legal capacity.

Check gender of Patient and then move on to Address, ID, and Contact Information.

NOTE: When reviewing the patient’s data, make sure they did not:
- Misspell the patients name,
- Omit last name suffix (i.e. Jr., I, II, III)
- Transpose the first name for the last name, and vice versa
- Omit any part of the address (i.e., house number, street suffix, apartment number)
- Enter the WRONG Date of Birth (DOB)
- Enter the WRONG ID# or ID Expiration Date
- Enter the WRONG City or Zip Code
Step 3 – Review Caregiver Data

If there is NO CAREGIVER, click Next.

Two Reminders:

1. If a caregiver is named, review the information required AND a completed, signed, Caregiver Certification MUST be uploaded by either the patient or the physician before the applications is submitted to DOH.

2. If the Applicant/Qualifying Patient is a Minor or an Adult Lacking Legal Capacity, the CAREGIVER information is REQUIRED and the Caregiver Certification and Minor Certification are REQUIRED.
Step 4 – Physician Certification

In this section, you will identify the debilitating medical condition(s) for which you are certifying the applicant/qualifying patient.

You will need to enter your personal data (name, address, license numbers, etc.) the FIRST time you enter a patient’s application.

Once your personal data is entered the FIRST time, you will not need to fill all of it in for each patient that you certify. The form will automatically fill in your information.

On this screen, you will need to:

- Identify the debilitating medical condition(s) that makes the patient eligible for the medical use of marijuana. Select as many as apply for the patient and click ‘Add’ after each one.
- Enter the type of doctor you are
- Enter your PVL license number and expiration date
- Enter your Controlled Substance license number and expiration date
- Enter the name you use for Professional & Vocational Licensing
Step 4 – Physician cont’d

- Continue entering information as prompted
- Enter your business address
- Enter your mailing address if not the same as business address
- Enter your phone number
- An alternate phone is also requested
- Email address is pre-filled

Remember, once your personal data is entered the FIRST time, you will not need to fill it in for each patient that you certify, the form will fill it in automatically.
Step 5 – Review Grow Site Designation

If the qualifying patient is not planning to grow their medical marijuana, click Next on the Grow Site screen.

If the qualifying patient is planning to grow or is planning to have their caregiver grow their medical marijuana, this section must be reviewed.

Reminder: The Grow Site Certification will not display as a document if there is no caregiver involvement in the grow site. In this case, Grow Site certification was included in their electronic Patient Certification.

If there is a caregiver involved - if a caregiver either is identified to grow OR owns or controls the property on which the medical marijuana will be grown, there is a Grow Site Certification document and they are also REQUIRED to complete and sign the Certification.

The Grow Site Certification must be scanned, signed, and attached/uploaded later in the process.
Step 6 – IF there are errors, Return to Patient

- If a patient submits an online application to a doctor and the doctor finds errors in patient, caregiver, or grow site information, the doctor can return the application to the patient by clicking the ‘Return to Patient’ button next to the application in the doctor’s Pending queue.
- The doctor will need to notify the patient of the required changes.
- Once the application is returned to a patient, it no longer displays in the Pending queue. It will redisplay when the patient resubmits it.
- There is no charge to the patient to resubmit to the doctor.
Step 7.a. – Download Documents

On this screen, a list of required documents displays BASED ON WHAT WAS ENTERED by the patient.

RECOMMENDED

• If forms have not already been uploaded by the patient, it is recommended that you download the certification forms from this screen. They will be pre-filled with the application number, patient name, and should correlate to information that you have reviewed thus far.

• The patient (and, if applicable, caregiver) must check the correct boxes on the forms and sign (wet signatures required) and date the documents before they are scanned in and uploaded/attached.

If needed, check to ensure you have all the required documents ready to upload in the next step, including copies of ID.

NOT RECOMMENDED

• If the patient brings signed certification(s) that match the information you are submitting online, you do not need to download the certifications. Just be sure the information MATCHES what was entered online or it will be considered INCOMPLETE.
Step 7.b. – Upload Documents

You can download the Patient’s documents that are attached to the application to ensure that they are correct. Remember, the system will prefill the forms to match what was entered in the system.

When the application is ready to be submitted to DOH, you then need to upload patient documents that are missing.

On this screen, you will be able to browse your computer or electronic device and upload the scanned documents.

- You should save your scanned documents in a way that makes them easily identifiable
- Select the first file to upload
- Your document NAME will be displayed.

**WARNING:**
DO NOT UPLOAD any documents if the patient needs to make any corrections. You must return the application to the patient for corrections and be sure it is correct and complete before doing any uploads. Your uploads will not be saved to the application until you submit it to DOH, and if you overwrite a patient’s document it will not be attached and the application will be INCOMPLETE.
Step 7.b. – Upload Documents (cont’d.)

Once the file is selected, click ‘Upload’ to upload the document.

**WARNING:**
DO NOT UPLOAD any documents if the patient needs to make any corrections. You must return the application to the patient for corrections and be sure it is correct and complete before doing any uploads. Your uploads will not be saved to the application until you submit it to DOH, and if you overwrite a patient’s document it will not be attached and the application will be INCOMPLETE.
Step 7.b. – Upload Documents (cont’d.)

After you have clicked ‘Upload’, the document will display and the ‘Remove’ button is available in case you need to remove the document.

**WARNING:**
Remember to only upload documents if the application if it is COMPLETE and ready for submittal to DOH.

If you upload the same type of document (i.e. Patient ID), the system will overwrite the previous upload of the same type.
Step 7.b. – Upload Documents (cont’d.)

Repeat this step for all of the documents that must be uploaded.

There is an ‘Other Documents’ option for documents that are not required.

**WARNING:**
Remember to only upload documents if the application is COMPLETE and ready for submittal to DOH.

If you upload the same type of document (i.e. Patient ID), the system will overwrite the previous upload of the same type.
Step 8 – Review Data

This screen displays all the data that has been entered.

- Click the ‘Show/Hide All’ button on the upper right of the screen, or click arrows on the right side to display or hide section data.
- Review all the data carefully to ensure it is correct.
- Note the highlighted fields:
  - ‘1’ – Minor Patient - Displays ‘No’ unless patient is a minor
  - ‘2’ – Adult lacking legal capacity - Displays ‘No’ unless you indicated that patient is an adult lacking legal capability
  - ‘3’ – Patient electronic signature - filled in for applications initiated by Patient
Step 8 – Review Data (cont’d.)

- Note that in the Medical Information Section, the Physician Certification Electronic Signature is blank until you electronically certify the application in the next step.
Step 9 – Physician’s Certification

- Electronic signature – the doctor will view a screen with the certification text shown to the right.
- Read the information and check the box certifying that you agree with the above statements.
- Then click ‘Continue’
- Then the application moves into the queue for DOH approval.
- There is no need to submit paper documents.
- Print a copy of the Thank you screen for your records.
- The application will disappear from your queue but the patient will be able to view it.
- You will only see it again if it is returned to you from DOH due to an error with medical information or uploads (see next slide).

**WARNING**

- You must have a Signature Agreement on File with DOH BEFORE you can utilize this feature or the application will not be processed.
- Your name will appear on the 329 Card.
Step 10 - Check your Pending Queue Daily for Returned Applications

- If you have submitted an application to DOH and there was an error relating to medical information or uploads, DOH will return the application to you and it will display in your Pending Queue as ‘Returned by DOH’. DOH will notify you via email of the reason for the return. Check your Pending Queue daily in case this occurs.

- DOH will return the application to the patient directly if there are other (i.e. visible data entry) errors.

- Cards will be mailed directly to the patient and physicians will receive a copy of the letter for their file records.
Step 10 - Check your Pending Queue Daily for Returned Applications (cont’d.)

- Open the application, make the change(s) and then re-submit to DOH.

- There is no additional fee for this during the application submittal process.
Thank you for participating in the DOH 329 Registry Patient Application System Training