

Say Hello to Digital Patient Letters

We can inform your patient of their estimated financial responsibility.

As an enhancement to our Benefits Investigation (BI) process, you now have the option of allowing GeneDx to securely email or text your patient/legal guardian a link to view their digital Patient Letter directly.

Your patient/legal guardian will be able to review the **estimated** financial responsibility provided by their health insurance company. These costs are solely based on the patient's health insurance benefits. They can then decide whether to move ahead with testing via our secure, HIPAA-compliant GeneDx Portal. You may still choose to give the Patient Letter directly to your patient/legal guardian, if you prefer. Once you obtain permission from your patient/legal guardian, it's easy to set up in a few simple steps.

With this new digital Patient Letter, your patient/legal guardian can:

- View their healthcare insurance's out-of-pocket estimate and the GeneDx self-pay pricing
- Download a PDF copy of their Patient Letter
- Choose whether to move forward with testing using the patient's health insurance, switch to self-pay, or cancel the test

HOW IT WORKS

1. Confirm you have consent from your patient/legal guardian that GeneDx may text and/or email them about their **estimated** out-of-pocket test costs from their healthcare insurance. They may opt out of text/email from GeneDx at any time and text and data rates may apply.
 - a. Obtain their preferred text and/or email to where they would like the digital Patient Letter sent.
 - b. Ensure that they are aware that they will have 72 hours to respond before the link expires.
2. Create an order in the GeneDx Provider Portal and conduct a BI.
3. When an instant BI is returned, click **Review & Send Patient Letter**
NOTE: This option is not available if a pending BI is returned or when a "Hold for BI" is requested.
4. A pop-up window will give you the option to download a PDF of the Patient Letter, which you can print or save. To have GeneDx text and/or email a link to your patient/legal guardian, click **GeneDx to Send to Patient** button.
5. Check the boxes for email and/or text message as appropriate, and enter the patient/legal guardian's contact information.
TIP: Providing accurate information is important, as GeneDx is not responsible for undelivered messages.
6. Review the terms and conditions, then check the box and click **Agree and Send** to trigger a GeneDx email or text message to your patient. A confirmation window will let you know it has been sent and remind you to subscribe to Portal Notifications.
7. The email/text will contain a link directing your patient or their legal guardian to a secure site, where they will verify their identity prior to viewing the Patient Letter. Upon viewing, they can choose one of 3 options:
 - a. Approve testing with the use of their healthcare insurance.
 - b. Approve testing and switch to self-pay
 - c. Cancel testing
8. You will be notified of their decision via Portal Notifications.
PRO TIP: Receive alerts about your patient's decision by subscribing to your Portal Notifications.

Step 4

Download the personalized Patient Letter in either English or Spanish.

<Patient Name> Patient Letter English <Patient Name> Patient Letter Spanish

Prefer that GeneDx send the letter to your patient? We can email or text a link to your patient/patient's legal guardian, for their review.

NOTE: This process is currently only available in English and may not be ideal for patients who require Spanish.

RETURN TO ORDER **GENEDX TO SEND TO PATIENT**

Step 6

Prior to completing the below form, confirm that you have your patient's or their legal guardian's consent for GeneDx to send them an email and/or text message. Additionally, please ask them to look for the communication from us. The link will expire in 72 hours.

The email/text will contain a link directing your patient or their legal guardian to a secure site, where they will verify their identity prior to viewing the Patient Letter. Upon viewing, they can choose to proceed with testing. If you have subscribed, you will be notified of their decision via Push Notifications. IMPORTANT: If a sample is sent, in and the patient has not cancelled, it is assumed that they have approved the estimate and we will proceed with testing.

PLEASE NOTE: The only language supported at this time with this process is English. Should your patient require the Patient Letter in Spanish, please give it to them directly.

My patient/patient's legal guardian has consented to being contacted via email/text to view the Patient Letter. The link should be sent to:

email: enter email *
patientexample@email.com

text message: enter mobile phone *
555-555-5555

I agree to the terms and conditions of this service. Text and data rates may apply. GO BACK **AGREE AND SEND**

Step 7

WELCOME TO GENEDX

Please complete the information below to verify your identity. Once verified, you can review the out-of-pocket estimate and choose to proceed with testing. This is time-sensitive and the estimate is only available for 72 hours from when you were first notified.

Email enter email

Patient DOB enter dob in MM/DD/YYYY format

Patient ZIP Code enter zip code

CANCEL **SUBMIT**

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TIME SENSITIVE

Once the text or email has been sent, the patient/legal guardian has **72 hours** to respond. If they do not make a selection within the 72-hour window, we assume they approve testing using the health insurance you entered into the Portal. If the order has been submitted and we receive the sample(s) at our laboratory, we will proceed with testing and your patient/legal guardian will be responsible for any out-of-pocket costs.

FAQS

If the patient/legal guardian has requested the order be canceled, what further actions need to be taken?

- If you have submitted the order and the sample is en route, GeneDx will cancel the order shortly after it is received, and no additional action is required from you.
- If you have submitted the order and the sample is NOT en route, you may choose to log into the GeneDx Portal at [genedx.com/order](https://www.genedx.com/order) and cancel the order, however this step is not required.
- If you saved the order as a draft and it has not been submitted, we recommend that you delete the draft in the GeneDx Portal.

If the patient/legal guardian has requested the payment type be switched to self-pay, what further actions need to be taken?

- If you have already submitted the order, GeneDx will update the order once we receive the sample(s) and no additional action is required from you. Please be aware that we will not be able to update the payment type until we receive the sample.
NOTE: The payment type change made by GeneDx Billing will not reflect in the Portal order.
- If you saved the order as a draft, you should update the payment type in the draft order prior to submitting it within the GeneDx Portal.

Is the digital Patient Letter available when a paper TRF is used?

No. Currently, digital Patient Letters are only available for orders initiated in the GeneDx Portal.

Is the digital Patient Letter available for pending BIs?

It depends. If you checked the 'Hold for BI' checkbox, then the digital Patient Letter will not be available as GeneDx Billing will reach out to the patient directly with the BI results. If you did not check the 'Hold for BI' checkbox, then the Patient Letter will be available to send to your patient/legal guardian once the manual BI has been returned in the GeneDx Portal.

What if a vacation or being out of town limits the ability to speak with the patient/legal guardian about their choice in a timely manner?

You can perform a BI and request that GeneDx send the digital Patient Letter to your patient/legal guardian, and then leave the order in draft status and/or not send the patient's sample until after you return to the office. GeneDx only starts testing if the order has been submitted and the sample received. Alternatively, you could arrange for GeneDx Portal notification coverage while out of town.

Can a link be resent to the patient/legal guardian if they did not receive it, or if the original 72-hour window has lapsed?

No. Our new BI process is designed to speed up test processing and eliminate unnecessary delays. That's why with the exception of BI holds, all submitted orders will be tested as soon as the sample arrives in the laboratory with needed paperwork. If the 72-hour window has passed, you may download the Patient Letter from the GeneDx Portal and share it directly with your patient/legal guardian. Patients/legal guardians may contact billing@genedx.com or call 1-888-729-1206, option 2 if they would like to switch to self-pay or cancel testing. They should reference their Benefit Investigation Case ID, found in the Patient Letter.