

Connecting patients to your account

Connect existing patients to your account

1. Click on the **'Patient search'** tab and enter in the patient's first and last name.
2. **If the patient is not connected to your account**, you'll be prompted to enter their date of birth (DOB) *plus one of the following*: Patient ID, Social Security Number (SSN), **or** Alien Number.
3. After you've input their information, click the **'Patient search'** button.
4. Matching patients will show up at the bottom of the screen, and you can connect them to your account.

Patient data is fictional.

The screenshot shows the Patient Advocate Foundation TotalAssist web application. The top navigation bar is purple with the logo on the left, the email address '@patientadvocate.org' in the center, and a 'Logout' button on the right. Below the navigation bar is a secondary menu with icons and labels for 'Dashboard', 'Applications', 'Claims', and 'Patient Search'. The 'Patient Search' tab is highlighted with a red box. The main content area has a header 'Patient Search' with a sub-header 'Let's Connect a Patient to Your Account'. Below this, a message states: 'You do not currently have access to this patient account but we can help with that. Provide us with the information below and we will be able to link this patient account to your account.' A bulleted list of required information is shown: 'Patient's First and Last Name', 'Patient's Date of Birth', and 'TotalAssist Patient ID OR Patients SSN OR Alien Identification Number (AIN)'. A note below the list says: '[Note: We only need you to provide one of these numbers]'. The form contains six input fields arranged in two rows. The first row has 'First Name' (containing 'Gayle'), 'Last Name' (containing 'Hughes'), and 'DOB (MMDDYYYY)' (containing '05/13/1953'). The second row has 'TotalAssist Patient ID', 'Patient SSN' (containing '698-42-1537'), and 'Alien Number'. A large red 'Patient Search' button is at the bottom center. On the right side of the page, there is a blue circular icon with a person symbol and a 'Let's Chat' button.

Patient Advocate Foundation
TotalAssist

@patientadvocate.org Logout

Dashboard Applications Claims Patient Search

Patient Search
Let's Connect a Patient to Your Account

You do not currently have access to this patient account but we can help with that. Provide us with the information below and we will be able to link this patient account to your account.

- Patient's First and Last Name
- Patient's Date of Birth
- TotalAssist Patient ID **OR** Patients SSN **OR** Alien Identification Number (AIN)

[Note: We only need you to provide one of these numbers]

First Name Last Name DOB (MMDDYYYY)

Gayle Hughes 05/13/1953

TotalAssist Patient ID Patient SSN Alien Number

698-42-1537

Patient Search

Let's Chat

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The screenshot shows the Patient Advocate Foundation TotalAssist Patient Search interface. The top navigation bar includes links for Dashboard, Applications, Claims, and Patient Search. The Patient Search section has a search bar with the text "Enter your patient's First and Last Name OR the TotalAssist Patient ID". Below the search bar, there are input fields for First Name (Juanita) and Last Name (Riversa), separated by an "Or" label. A "Patient Search" button is located below the input fields. To the right of the search bar, there is a "Login" button. Below the search bar, there is a "Patient Search" button. Below the search bar, there is a "Patient Search" button.

Patient Id 315950
Patient Name JUANITA RIVERA
Date of Birth 07/15/1987
Address 421 Butler Farm Rd, HAMPTON, VA, 23692
Phone No 658-666-5555

APPLICATIONS

+ CREATE APPLICATION

Show 5 rows entries

Fund Name	Award Year	Balance	Eff Date	Expiry	Status	Actions
Breast Cancer	2026	\$4514....	Jun 5, 2026	Jun 5, 2027	Approved	   
Breast Cancer	2026	\$6500....	Jun 1, 2026	Jun 4, 2026	Expired	  

Showing 1 to 2 of 2 entries

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Patient Name JUANITA RIVERA
Date of Birth 07/15/1987
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Breast Cancer	2026	\$6500....	Jun 1, 2026	Jun 4, 2026	Expired	  

If the patient is already connected to your account, their basic demographic information will display below your search, along with a list of related applications and actions.

Patient data is fictional.

Patient not found?

The screenshot shows the Patient Advocate Foundation TotalAssist web application. At the top, there is a purple header with the logo on the left, a user profile icon and email address (@patientadvocate.org) in the center, and a Logout button on the right. Below the header is a navigation bar with links to Dashboard, Applications, Claims, and Patient Search. The Patient Search link is active. A red pop-up message box in the top right corner displays the text "Patient Doesn't Exist" with a close button (X). The main content area is titled "Patient Search" with the subtitle "Let's Connect a Patient to Your Account". It contains a message: "You do not currently have access to this patient account but we can help with that. Provide us with the information below and we will be able to link this patient account to your account." Below this message is a list of required information: Patient's First and Last Name, Patient's Date of Birth, and TotalAssist Patient ID OR Patients SSN OR Alien Identification Number (AIN). A note specifies: "[Note: We only need you to provide one of these numbers]". The form fields are: First Name (Jessica), Last Name (Jackson), DOB (MMDDYYYY) (02/21/1990), TotalAssist Patient ID, Patient SSN (548-26-7754), and Alien Number. A large blue "Patient Search" button is at the bottom of the form.

If your patient is not found, you'll receive an on-screen pop-up message in red that reads **'Patient doesn't exist'**.

To generate a record for that patient, create an application.

Patient data is fictional.