

Overview of main portal navigation and features

Portal home screen – Pharmacy dashboard (new account)

As you complete applications and submit claims, **'Recent activities'** and **'Actions required'** sections will populate

The screenshot displays the Pharmacy Dashboard for a new account. The top navigation bar is purple with the Patient Advocate Foundation TotalAssist logo on the left and a 'Logout' button on the right. Below the navigation bar, a horizontal menu contains four items: 'Dashboard' (highlighted with a purple box), 'Applications', 'Claims', and 'Patient Search'. The main content area is titled 'Pharmacy Dashboard' with a subtitle 'List of all the Action Items'. It is divided into two columns: 'Recent Activities' and 'Actions Required'. Both columns feature an illustration of people interacting with a large screen displaying charts and graphs. Below each illustration, the text 'No Activities found!' and 'No Actions found!' respectively is displayed. On the right side of the dashboard, there is a blue circular icon with a white person silhouette and a 'Let's Chat' button. The footer is purple and contains the copyright notice 'Copyright © 2026 . All rights reserved.'

Portal home screen – Pharmacy dashboard (existing account)

Recent activities are listed in reverse chronological order.

Select '**View all**' to see all activities or required actions.

Click '**View details**' or '**Complete action**' hyperlinks to view full activity details or complete required actions.

The screenshot shows the Pharmacy Dashboard interface. At the top, there is a navigation bar with the Patient Advocate Foundation TotalAssist logo on the left and a Logout button on the right. Below the navigation bar, there is a secondary navigation bar with links to Dashboard, Applications, Claims, and Patient Search. The main content area is titled "Pharmacy Dashboard" and includes a subtitle "List of all the Action Items". It is divided into two main sections: "Recent Activities" and "Actions Required".

Recent Activities

JANE SMITH App ref APPTAA20263840004 is Received View Details
JANE SMITH App ref APPTAA20263840004 is Application Pending View Details
JOHN DOE App ref APPTAA20263840003 is Application Approved View Details

[View All >>](#)

Actions Required

Ref	Patient	Actions
Awaiting Income Verification	JANE SMITH	Complete Action

[View All >>](#)

At the bottom right of the dashboard, there is a "Let's Chat" button.

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Patient data is fictional.

Applications tab

Applications

List of all applications in your account

+ Create Application

Search and Filter

Patient Name	Status	Award Year	Balance	EFF Date	Expiry Date	LookBack Date	Action
JUANITA RIVERA	Approved	2026	\$6,500.00	Jun 5, 2026	Jun 5, 2027	Dec 7, 2025	View Application Details →
GAYLE HUGHES	Approved	2026	\$6,500.00	Jun 4, 2026	Jun 4, 2027	Dec 6, 2025	View Application Details →
JUANITA RIVERA	Expired	2026	\$6,500.00	Jun 1, 2026	Jun 4, 2026	Dec 3, 2025	View Application Details →

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Let's Chat

Application and grant award information can always be accessed in the **'Applications'** tab of the portal.

The most recent application will be listed first, and you can use the **'Search and filter'** button to locate a particular patient.

To view full application information, click **'View application details'**.

Patient data is fictional.

Applications tab – search and filter

The screenshot shows the 'Applications' tab in the Patient Advocate Foundation TotalAssist system. The top navigation bar includes 'Dashboard', 'Applications' (highlighted with a red box), 'Claims', and 'Patient Search'. A 'Logout' button is in the top right. Below the navigation bar, the 'Applications' section has a sub-header 'List of all applications in your account' and two buttons: '+ Create Application' and 'Search and Filter' (highlighted with a red box). The search area contains two rows of filters. The first row has 'SEARCH BY PATIENT NAME', 'OR', 'SEARCH BY STATUS' (with a dropdown arrow), 'OR', and 'SEARCH BY FUND' (with a dropdown arrow). The second row has 'SEARCH BY DOB (MMDDYYYY)' and 'OR', 'SEARCH BY SSN or A-NUMBER'. Below these are three filter categories: 'EXPIRY' with options 'Expiring in the next 7 days', 'Expired in the last 7 days', and 'Expired in the last 30 days'; 'ACTIONS REQUIRED' with options 'Missing Diagnosis Verification', 'Missing Income Document', and 'Pending Revoke - No Claims Activity'; and 'APP CLOSURE' with options 'Revoked today' and 'Revoking in 7 days'. An 'Apply Filter' button is at the bottom. A 'Let's Chat' button is in the bottom right corner.

The **‘Search and filter’** button is a great way to find patient applications quickly!

Search by:

- Name
- Date of birth
- Social Security Number or Alien Number
- Fund
- Application status (e.g., approved, expired)

Filter by:

- Expiration date
- Actions required (e.g., missing diagnosis verification, missing income document)
- Awards that may be revoked due to inactivity (no claims submitted)

Claims tab

Patient Advocate Foundation

TotalAssist

Logout

Dashboard

Applications

Claims

Patient Search

Claims

All the claims submitted

+ Submit a Claim

Show 5 rows entries

POE ID	Check No	Patient Name	Submission ...	Amount Sub...	Paid Amount	Status	Action
P-1143015		JUANITA RIV...	06/05/2026	\$0.00	\$0.00	DENIED	
P-1143014	60392	JUANITA RIV...	06/05/2026	\$1985.57	\$1985.57	P View Claim	
P-1141016	60382	GAYLE HUGH...	06/04/2026	\$1314.64	\$1314.64	PENDING	
P-1141015	60383	GAYLE HUGH...	06/04/2026	\$1289.22	\$1289.22	APPROVED	

Showing 1 to 4 of 4 entries

Previous

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Let's Chat

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The ‘**Claims**’ tab will display all claims submitted by users affiliated with your NPI.

Note: You will not be able to see claims made by patients or other providers.

Click the bold headings to sort claims by a particular column.

Click the eye icon to view detailed information for that claim.

Patient Search tab

The screenshot shows the 'Patient Search' tab selected in the navigation menu. The main heading is 'Patient Search' with the subtext 'Let's Search for a Patient'. Below this, a prompt asks the user to 'Enter your patient's First and Last Name OR the TotalAssist Patient ID'. There are input fields for 'First Name', 'Last Name', and 'TotalAssist Patient ID', separated by an 'Or' label. A large blue 'Patient Search' button is positioned below the input fields. A red arrow points to this button from the right side of the slide.

Patient Advocate Foundation
TotalAssist

Logout

Dashboard Applications Claims **Patient Search**

Patient Search
Let's Search for a Patient

Enter your patient's **First** and **Last Name** OR the **TotalAssist Patient ID**

First Name Or TotalAssist Patient ID

Last Name

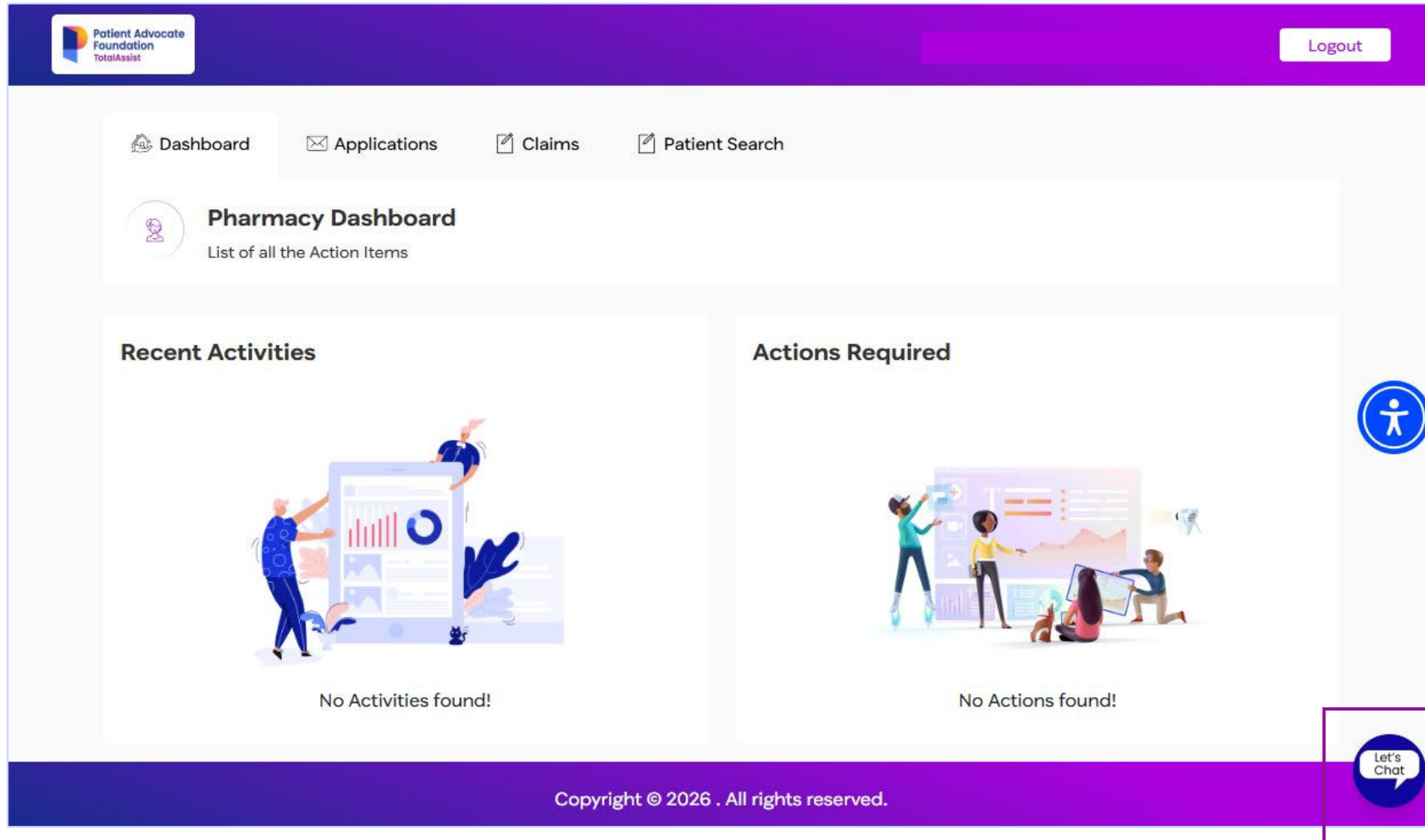
Patient Search

Use the '**Patient search**' tab to:

- Search for an existing patient that is already connected to your account
- Look up a patient that you would like to connect to your account

To begin a search, enter the patient's first and last name OR their Patient ID and click '**Patient search**'.

Chat feature



Need help? You can chat with a member of our support team during regular business hours (*Monday – Friday, 8:30 AM – 5:30 PM ET*) by clicking 'Let's Chat' in the bottom right of the screen.