

Overview of main portal navigation and features

Portal home screen – Provider Dashboard (new account)

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

Patient Advocate Foundation
TotalAssist

Logout

Dashboard Applications Claims Patient Search

Provider Dashboard
List of all the Action Items

Recent Activities

No Activities found!

Actions Required

No Actions found!

Let's Chat

Copyright © 2026 . All rights reserved.

Portal home screen – Provider 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.



Logout

Dashboard

Applications

Claims

Patient Search



Provider Dashboard

List of all the Action Items

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 >>



Let's Chat



TotalAssist.org

Copyright © 2026 . All rights reserved.

3

Applications tab

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

Page 1 of 1

Next

Let's Chat

Copyright © 2026 . All rights reserved.

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

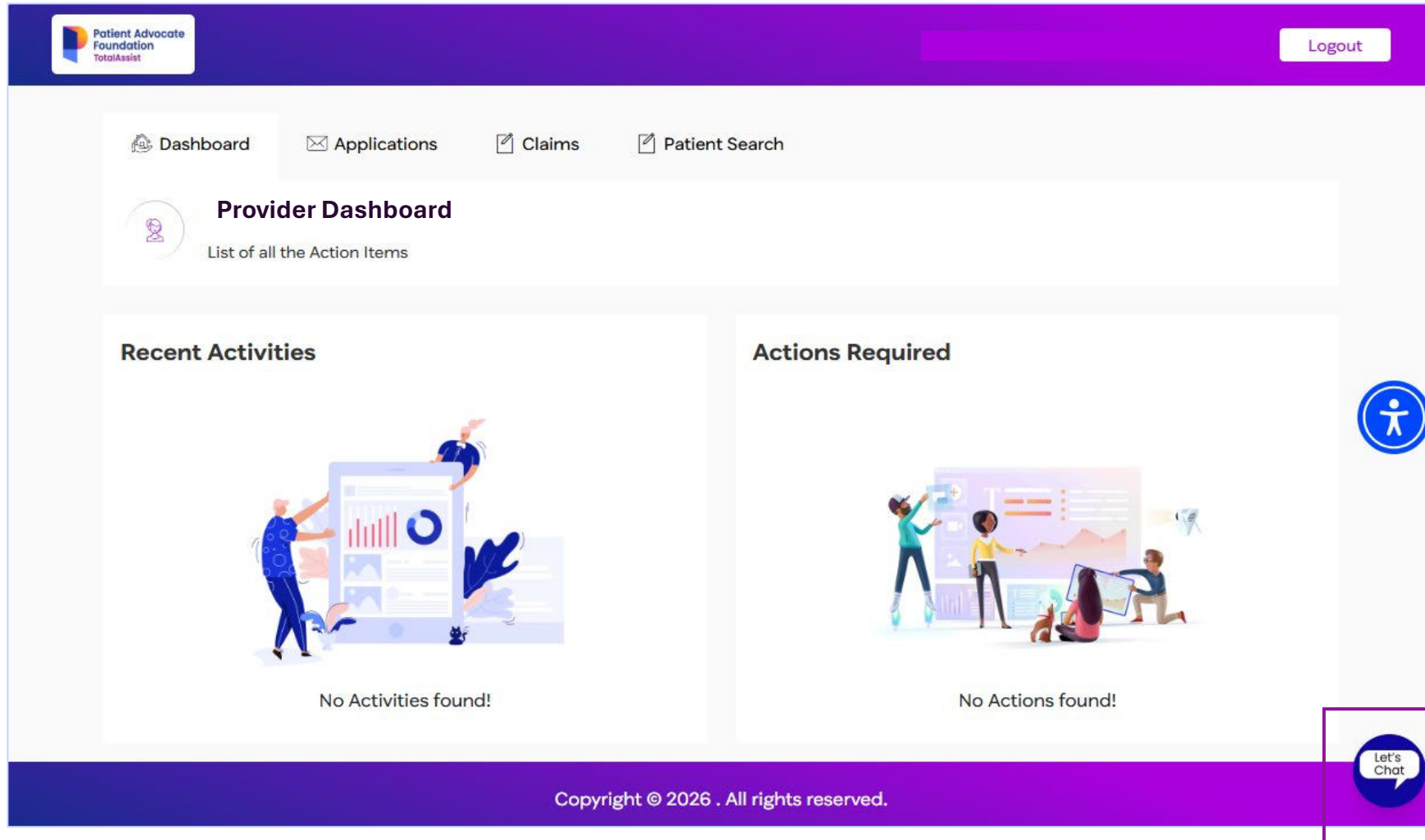
The screenshot shows the Patient Advocate Foundation TotalAssist interface. At the top, there is a purple header bar with the logo on the left and a 'Logout' button on the right. Below the header, a navigation bar contains icons and labels for 'Dashboard', 'Applications', 'Claims', and 'Patient Search'. The 'Patient Search' tab is highlighted with a red box. The main content area is titled 'Patient Search' with the subtitle 'Let's Search for a Patient'. It features a search form with the instruction 'Enter your patient's First and Last Name OR the TotalAssist Patient ID'. The form has three input fields: 'First Name', 'Last Name', and 'TotalAssist Patient ID', separated by an 'Or' label. A red 'Patient Search' button is positioned below the input fields. A large red arrow points from the right towards this button.

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.