

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 and contains the logo, the text '@patientadvocate.org', and a 'Logout' button. Below the navigation bar is a menu with icons 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 the subtext 'Let's Connect a Patient to Your Account'. Below this is 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.' This is followed by 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 states: '[Note: We only need you to provide one of these numbers]'. The form fields are: 'First Name' (Gayle), 'Last Name' (Hughes), 'DOB (MMDDYYYY)' (05/13/1953), 'TotalAssist Patient ID', 'Patient SSN' (698-42-1537), and 'Alien Number'. A large purple 'Patient Search' button is at the bottom. On the right side, there is a blue chat icon and a 'Let's Chat' button.

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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: Juanita Or TotalAssist Patient ID

Last Name: Riviera

Patient Search

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

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	[Eye] [Plus] [Trash] [Print]
Breast Cancer	2026	\$6500...	Jun 1, 2026	Jun 4, 2026	Expired	[Eye] [Trash] [Print]

Showing 1 to 2 of 2 entries

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	[Eye] [Plus] [Trash] [Print]
Breast Cancer	2026	\$6500...	Jun 1, 2026	Jun 4, 2026	Expired	[Eye] [Trash] [Print]

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 user interface. At the top, there is a navigation bar with the logo, the text '@patientadvocate.org', and a 'Logout' button. Below this is a secondary navigation bar with links for 'Dashboard', 'Applications', 'Claims', and 'Patient Search'. The main content area is titled 'Patient Search' with the subtitle 'Let's Connect a Patient to Your Account'. A red pop-up message in the top right corner reads 'Patient Doesn't Exist'. The main text 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.' Below this 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 contains the following fields: 'First Name' (Jessica), 'Last Name' (Jackson), 'DOB (MMDDYYYY)' (02/21/1990), 'TotalAssist Patient ID', 'Patient SSN' (548-26-7754), and 'Alien Number'. A purple 'Patient Search' button is located 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.