

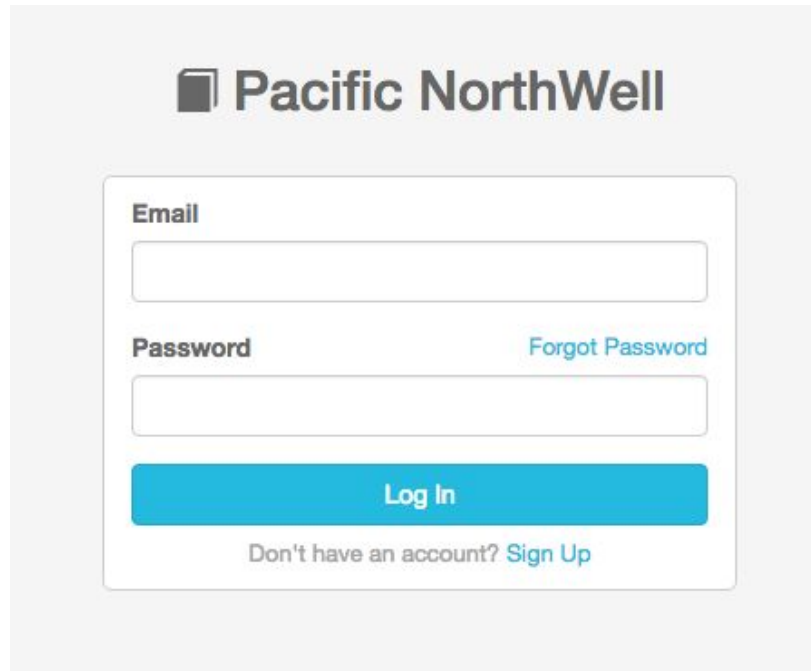
# How to Submit Insurance and Demographic Information



Guide for Pacific NorthWell Clients

# Login to the Client Portal

1. Please visit: <http://pacificnorthwell.com/appointments/> and click on “Client Portal”
2. Login using the credentials you created when you first booked your appointment



The image shows a login form for Pacific NorthWell. At the top, there is a logo consisting of a square icon with a book-like shape inside, followed by the text "Pacific NorthWell". Below the logo, there is a white rectangular box containing the login fields. The first field is labeled "Email" and has a text input box. The second field is labeled "Password" and has a text input box. To the right of the password field, there is a link that says "Forgot Password". Below the password field, there is a blue button with the text "Log In". At the bottom of the form, there is a link that says "Don't have an account? Sign Up".

1. When you login, you'll see any upcoming appointments
2. Please press "Demographic Info" at the top

+ NEW APPOINTMENT

☰ DEMOGRAPHIC INFO

\$ BILLING AND INSURANCE

☰ APPOINTMENTS

TEST ▾

## 📅 Appointments

Please press the "Demographic Info" tab

Show

Upcoming

Kept

Appointments

No appointments to show.

Please fill out all fields in this section and press “Save”

+ NEW APPOINTMENT **DEMOGRAPHIC INFO** \$ BILLING AND INSURANCE APPOINTMENTS TEST ▾

**Demographic Info** Press save once done → **Save Demographic Info**

### Address

→ Street

→ City

→ State/Province

→ Zip/Postal Code

→ County

### Emergency Contact

→ Full Name

→ Phone #

→ Relationship

### Demographic

→ Birth Date

→ Social Security #

**Attention!** For security reasons we do not show full SSN. To add or update SSN, enter digits without dashes, otherwise SSN will not be saved. ✕

→ Gender

→ Race

→ Marital Status

→ Religion

→ Employment

→ Employer

1. Go to the “Billing and Insurance” tab at the top
2. Complete all the fields
3. Click on “Add Insurance” if you plan on using it
4. Press “Save Changes” once done

**+** NEW APPOINTMENT    **≡** DEMOGRAPHIC INFO    **\$ BILLING AND INSURANCE**    **≡** APPOINTMENTS    TEST -

**\$ Billing and Insurance** Save Changes

**Bill To**

**Name**     **Address**

**Phone**

**Email**

**Insurance Information**

Add Insurance Remove Last Insurance

Save once done Save Changes

Go to “Billing and Insurance”

Click on “Add Insurance” if you plan on using it

# For Insurance Clients Only

1. This section is not required for self-pay clients. Please check [rates for self pay clients](#).
2. Please fill out all the fields in this section if you plan on using insurance.
3. The field “Plan Subscriber Employer” is only needed if you are insured through your employer.
4. For the field “Co-pay Amount”: if not known, please verify your insurance benefits before coming in.
5. If the field “Relationship to Insured” is other than “Self”, please fill out all the fields in the green box.
6. Please press “Save Changes” on the bottom right.

### Insurance Information

Primary Insurance

If “Relationship to Insured” is other than “self” please fill out all fields in the green box

→ Insurer\* --select-- → Relationship to Insured\* Self

→ Insured ID Number

→ Plan Name

→ Effective Date

→ Policy/FECA Number

→ Group Number

→ Plan Subscriber Employer Only if insured through employer

→ Co-pay Amount \$ Please verify with your insurance

Authorize Payment to Provider Yes No

Release Medical Records and Billing Info to Insurance Yes Not Required

Info about Insured:  
(required if not Self)

First Name

Last Name

Middle Name

Phone

Birth Date

Gender Undefined

No., Street

City

State/Province

Zip/Postal Code

Add Insurance Remove Last Insurance

Save Changes

# Thank You

Please contact your healthcare provider if you need further assistance.

We look forward to meeting with you.