HOW TO:
LINK PATIENTS TO YOUR PORTAL ACCOUNT
How to link patients to your portal account

This portal guide will take you through the steps to link a patient to your portal account. Linking a patient to your account will give you, and all other users in your organization, visibility into all letters PAN sends about their grant and the ability to manage their grant online.

1. Log in to your provider or pharmacy portal account and select “Link New Patient” in the top, right corner by the search button.

2. This will take you to the “Link an existing patient” pop-up box. There are two ways to search for a patient:

   a. Type in their member ID and date of birth, OR
   b. Type in their first and last name and date of birth.

   Then click “Search Database.”

   **Note:** We recommend searching by member ID and date of birth. That way, the search will not yield multiple patients with the same name and date of birth.

   **Note:** The search will only produce exact matches. Make sure to double check that your patient information is correct.
The search results will show the patient in our system matching the information you provided. When you find the correct patient, click “Link patient” in the “Actions” column to link them to your account.

a. If no patients are found matching your search, please double-check that your patient information was correct. If this still does not work, please call us at 1-866-316-7263 from Monday through Friday, 9 a.m. – 7 p.m. ET.
Once you have linked the patient to your account, you can choose to link another patient or review their patient details. The patient's information will instantly become visible to all users in your organization.

Note: If you made a mistake and need to unlink the patient from your account, please call us at 1-866-316-7263 from Monday through Friday, 9 a.m. – 7 p.m. ET.

For more information about how to manage your account or use the PAN portal refer to our webinar library, our other how-to guides, or review the pharmacy or provider FAQs.