

Client Success Center

How to: Update Providers



Tell us about a new medical provider

From the homepage, click the **Update My Info** button, and you will be directed to the My Info page.

Navigate to the Medical Providers section to view the providers we have listed on our file.

PROVIDER / FACILITY NAME	ADDRESS	CITY	STATE	LAST VISIT	STATUS
Edit Dr. Jones	1 Delaware Drive	Boston	MA	6/01/2020	No current visits but possible future visits
Edit Medical Associates of America	100 Clancy Circle	Boston	MA	6/12/2020	Still treating
Edit Dr. Smith	200 Laurel Lane	Boston	MA	4/15/2020	Still treating

To add a new provider, click **Add Provider** and a window will pop up.

Enter the provider details, including name, type, and specialty.

Enter the provider contact information, including address, phone, and fax.

Enter your current care status with the provider, including the date of your first, last, and next visits.

When finished, click **Save**.

Edit an existing provider's information

To edit provider details, contact information, or care status, click **Edit** and a window will pop up.

Locate the field(s) you need to change, make the change, then click **Save**.

You will be unable to edit the provider information for any provider who we have begun requesting records from. The following notice will popup if you attempt to edit the information for one of these providers.

You can also access the My Info page and edit your provider's information by clicking **My Info** from the top left menu of the homepage.

