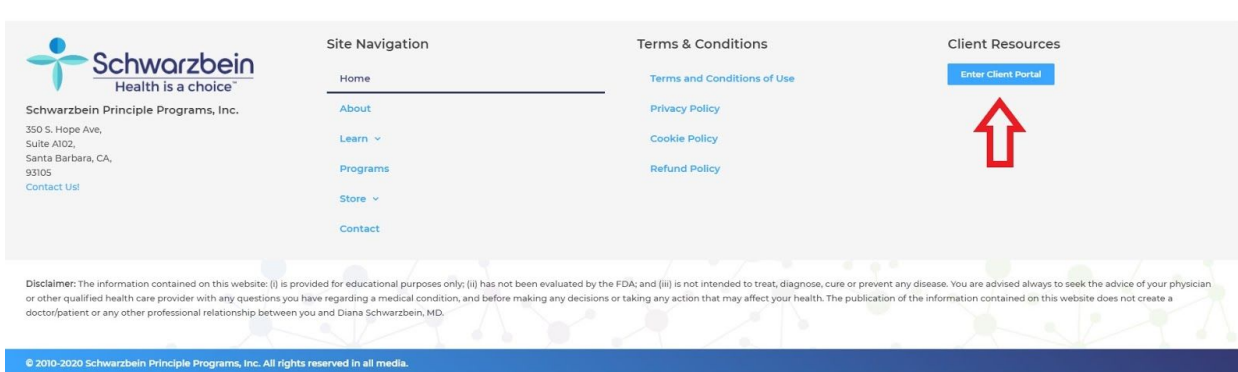


IntakeQ Quick-Start Guide

Your new Patient Portal in **IntakeQ** provides several popularly requested features including digital forms, online payments, and document archives. These features should help your experience with The Schwarzbein Institute to be more organized and streamlined. Please take a few minutes to familiarize yourself with the information below so you'll be able to immediately realize the benefits of using this new system while minimizing the time it takes to get started.

Setting Up Your Patient Portal

You will receive an email from appointments@schwarzbeinmd.com with the subject line “**Your Messaging Portal with The Schwarzbein Institute**”. To set up your portal, open this email, click the green *Register* button, input the password you want to use, and click Register. That’s all there is to it. Your portal is now set up. To access the portal going forward, we have added an *Enter Client Portal* button in the footer of our [website](#).

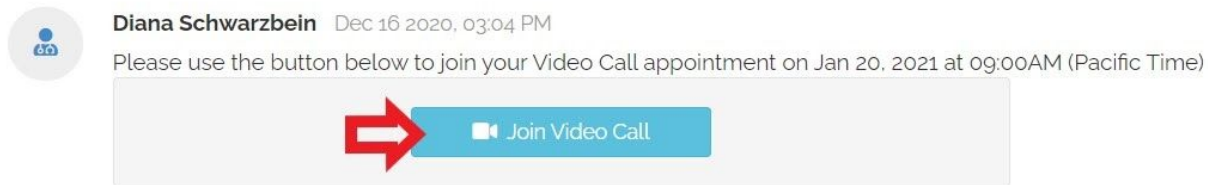


Here’s what you will find there...

MESSAGES

In this section you will see messages we send you to alert you to certain things, for instance, to let you know that we have sent you a document such as your Next Appointment Instructions, Lab Test Results, or Appointment Confirmations. Each time we upload a document to your portal, you will also receive an email with a link to that specific document. You can choose to access the document either from the emailed link, or by clicking on *MESSAGES* or *SHARED DOCUMENTS* in your portal.

Telemedicine appointments: The *MESSAGES* section will also show a message with the link (button) you need to start your scheduled telemedicine calls, as seen below



IMPORTANT:

DO NOT USE THIS MESSAGING PLATFORM IN THE PLACE OF REGULAR EMAIL!

Only reply to these types of messages regarding the specific subject matter of the message, itself.

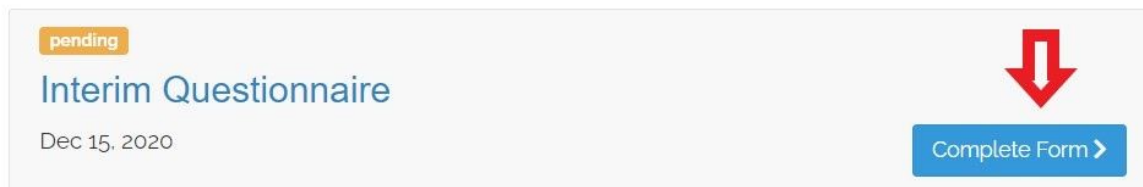
Continue to send medical related emails to medical@schwarzbeinmd.com. Replies regarding medical issues that you sent through this system will not receive a response.

FORMS

One of the most requested features of the IntakeQ system is the capability to complete forms online instead of having to download them, print them, fill them out, and then scan and email them back to us. With the new system, the forms you need will already be uploaded to your portal and you can fill them out online and simply save them. Also, some of the required information will pre-populate so you won't have to enter it every time.

In preparation for each appointment, here's what you will need to do:

- You will receive an email with a link to open the password protected form. Alternatively, you can sign in to your portal, select *FORMS* from the menu, and access your respective forms that way.
- Any form that needs to be completed will be marked *Pending*.
- To fill in the form, click on the blue *Complete Form* button.
- As you are filling out your form, you can click the green *Save* button to save what you have already entered without submitting the form so you come back later to complete it.
- Once you have completed the form, click the orange *Submit Form* button.
- After submitting the form, click the blue *Sign Out* button, and then close the browser tab that contained the form. You will still be signed into your portal account.
- NOTE: If you would like to see the information in a previously completed form, select *Open PDF* next to any completed form in the *Forms* section of the portal.



INVOICES

We will no longer be emailing your Superbills - the receipts you need for your insurance claims. Instead, they will be stored in your portal where you will always be able to access them (for 2021 forward).

To view any Superbill, go to the *INVOICES* section of the Portal, and click on the blue *Superbill* link next to the corresponding appointment date. If you click on *Open PDF*, you will see a PDF of your paid invoice. However, the invoice is not a substitute for the Superbill as it does not contain the data your insurance company requires to process your claim.

DESCRIPTION	TOTAL / PAID	DATE / DUE	STATUS		
10 Minute Telemed Appointment - 12/15/20 #0001	\$165.00 \$165.00	Dec 15, 2020 Dec 22, 2020	paid	Superbill	Open PDF

NOTE: If you did not pay for your appointment at the time of your visit, please click the orange *Pay Invoice* button to make your payment. If the invoice has not been paid, you can still open the Superbill, which will show that a payment hasn't been received. Once you pay the invoice, the Superbill will update automatically to show that it has been paid.

DESCRIPTION	TOTAL / PAID	DATE / DUE	STATUS		
10 Minute Telemed Appointment - 12/15/20 #0001	\$165.00 \$0.00	Dec 15, 2020 Dec 22, 2020	unpaid	Superbill	Pay Invoice >

SHARED DOCUMENTS

This section is where you will find your Next Appointment Instructions, Appointment Confirmations, Lab Test Results, Kit Instructions, and other documents that we may send you. When we upload a document to you, you will receive an email with a link to access that document. If you have questions or need additional information regarding that document, you can simply reply to that email which will go to appointments@schwarzbeinmd.com.

Here's an example of what you will see in the *SHARED DOCUMENTS* section of your portal:

Next Appointment Instructions

Shared with you on Dec 16, 2020

Open Document >

APPOINTMENTS

The *APPOINTMENTS* section will have a list of all your previous (2021 forward) and upcoming appointments with Dr. Schwarzbein. The list will include the appointment date, time, and type, as below:

Jan 20 2021 09:00 AM PST	30 Minute Telemed Appointment 📍 350 S Hope Ave., Suite A102, Santa Barbara, CA, 93101 👤 Diana Schwarzbein 🕒 30 minutes	confirmed
Dec 15 04:30 PM PST	10 Minute Telemed Appointment 📍 350 S Hope Ave., Suite A102, Santa Barbara, CA, 93101 👤 Diana Schwarzbein 🕒 10 minutes	confirmed

PACKAGES

Please disregard this section.

CREDIT CARDS

Also, by popular request, we now have the ability to securely store your credit card information to expedite the checkout process. Once in your portal, click on *CREDIT CARDS*, then click on the *Add New Credit Card* button, and enter the details of your preferred payment card.

My Credit Cards



If you add more than one card, you will need to designate one of them as your preferred card.

My Credit Cards



Please note: Your stored payment card information is completely secure and cannot be seen by any of our staff, ever! We are using Square as our credit card processor. Square is used by millions of medium and small businesses. For information regarding their security, please visit <https://squareup.com/us/en/security>

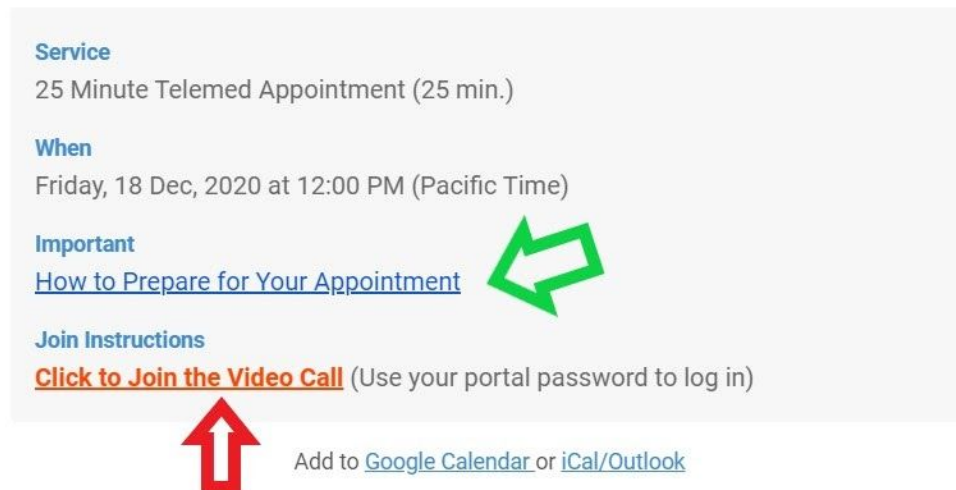
Telemedicine Appointments

With our new system, we will no longer be using our previous telemedicine platform (Doxy), and will now be conducting all telemedicine appointments using IntakeQ.. Telemedicine calls in IntakeQ can be done using either a desktop computer, a tablet, or most smartphones. Here are the two methods you can use to initiate your call:

#1 - Starting Your Call via Email Link

When you schedule your telemedicine appointment, you will immediately receive an email with a link to access your telemedicine appointment. This email will be resent to you three times: four days prior, three hours prior, and 15 minutes prior to your appointment. These emails include a link titled “*How to Prepare for Your Appointment.*” A few minutes prior to your next appointment, please click on this link and read the instructions on the page it directs you to to make sure you understand how to start your call.

- When ready to begin the call, click on the “Click to Join the Video Call” link in the email.
- If you are not already signed into your portal, you will be taken to a sign-in page where you will be prompted to enter your email address and password.
- Click the blue *Notify Host* button. Wait for us to start the call
- Once we begin the call, you will see a new window appear. Click on the green *Join Session* button to be connected to us.



2 - Starting Your Call Via the Portal

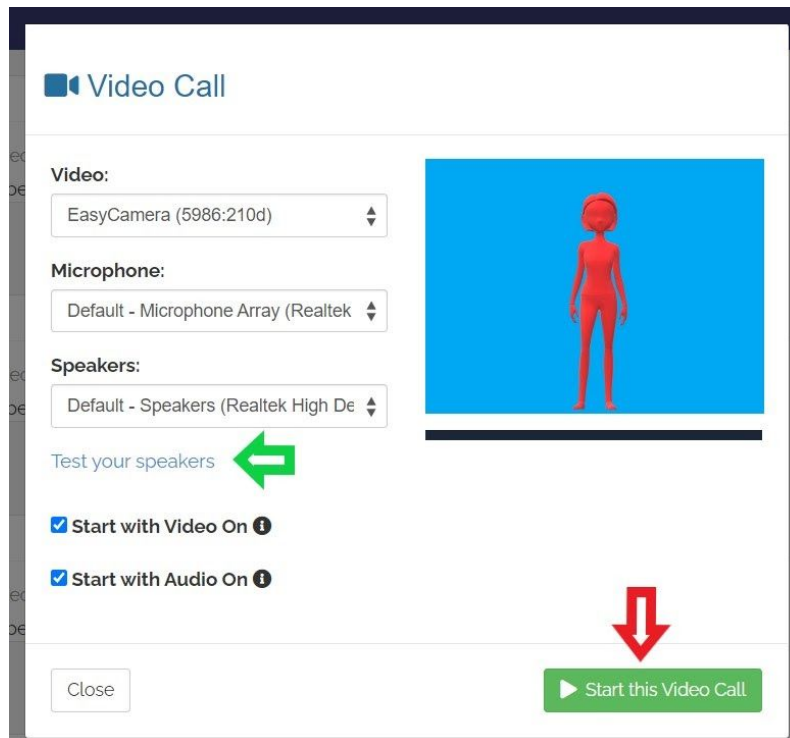
Alternatively, you can also begin your telemedicine call from within the *MESSAGES* section of your portal account.

- Click on the blue *Join Video Call* button for your appointment date (see image below).
- In the pop-up window, make sure that you have the proper camera, microphone, and speakers enabled. Typically, your computer will automatically select the correct settings.
- Test your speakers by clicking on *Test your speakers*.
- When ready, click the green *Start this Video Call* button. Click the blue *Notify Host* button. Wait for us to start the call.
- Once we begin the call, you will see a new window appear. Click on the green *Join Session* button to be connected to us.



Diana Schwarzbein Dec 16 2020, 03:04 PM

Please use the button below to join your Video Call appointment on Jan 20, 2021 at 09:00AM (Pacific Time)



Appointment Reminders

In addition to the Next Appointment Instructions and Appointment Confirmations you will receive, the IntakeQ system will also send you Appointment Reminder emails, the first one being sent at the time of booking your appointment. Subsequent reminders will be sent four days prior to your appointment and, again, three hours prior to your appointment. Telemedicine appointments will also receive a final email reminder 15 minutes prior to the appointment. All telemedicine appointment reminder emails will include a link to access the call. If need be, you can directly respond to these emails, which will go to appointments@schwarzbeinmd.com.

If You Need Assistance

If you have questions or need assistance with accessing or using your new Patient Portal:

For all NON-URGENT IntakeQ support questions, please **email** support@drschwarzbein.com. Please **DO NOT** send any medical or care related questions or information to this address.

For all URGENT IntakeQ support questions, **call** 805-699-5715 between the hours of 9am-5pm Pacific Time, Monday-Friday. Please **DO NOT** use this number for any medical or care-related issues.

For Telemedicine Appointments: If you need help initiating your telemedicine appointment, call the office at 805-563-0003.

We believe that, once you have familiarized yourself with it, you will find the IntakeQ system will save you time and help to keep your Schwarzbein Institute documents and information well organized and, literally, at your fingertips. Thanks so much for your flexibility and patience as we make this exciting transition.