



# Center for Anxiety

## Insync Patient Portal Guide

The following guide provides an overview of the features and functionalities of the Insync Patient Portal. If you see this toggle symbol:

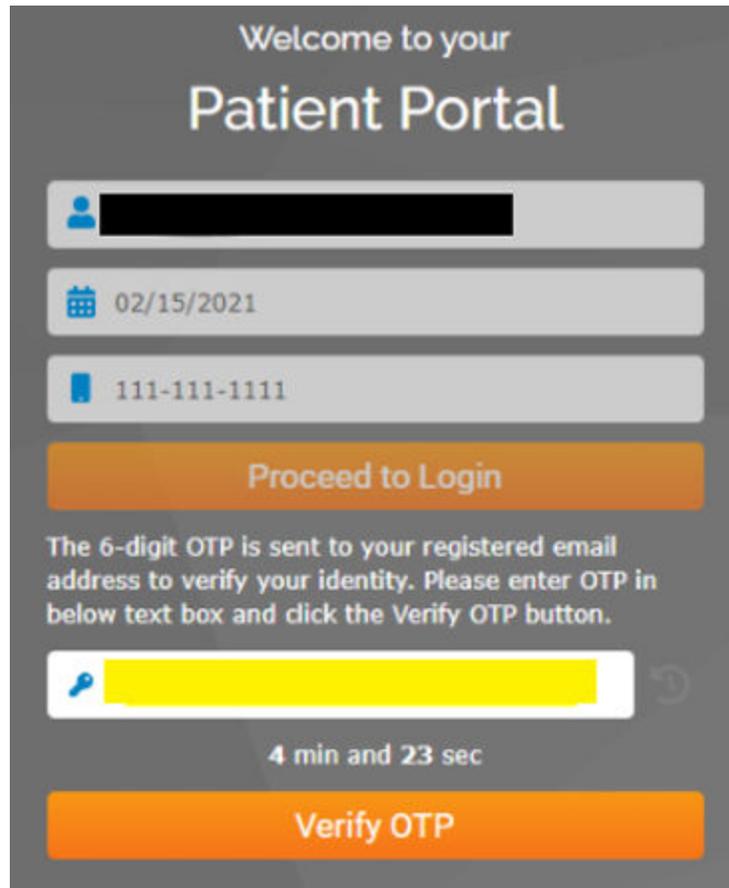


you can click on it to expand the section for more information.

### Initial Portal Registration and Required Forms

- An invitation to access the Center for Anxiety's PatientPortal will be sent to the email address on file. The portal activation email will have the subject line: " NYC Psychology PC (Center for Anxiety LLC) welcomes you to the Patient Portal." It will be sent from email address: [donotreply@alert.insynchcs.net](mailto:donotreply@alert.insynchcs.net) and the sender will be "InSync Administrator". It's best to add this address to your contacts so the email does not go to spam. The portal works best in Google Chrome. Please check your spam folder if you do not see the email.
- To activate your login, click on the "Click here to activate your login" button in the email. This will redirect you to the portal login page.
- The Insync Patient Portal link is: <https://centerforanxietyintouch.insynchcs.com/>
- On the login page, enter the patient's username and password provided in the activation email, which is valid for 72 hours. If you are attempting to login for the first time after the activation link has expired, please email [info@centerforanxiety.org](mailto:info@centerforanxiety.org) to have your portal invitation resent.
- Enter your date of birth and phone number on file with the Center for Anxiety.

- After entering your information, Insync will send you another email with a 6-digit code. This code must be entered within 5 minutes. If you do not receive the code, try refreshing your email by logging in and out of your account, refreshing your browser, or checking your spam/junk folder.



The screenshot shows a mobile-style interface for a patient portal. At the top, it says "Welcome to your Patient Portal". Below this are three input fields: a user ID field (with a person icon and a blacked-out value), a date field (with a calendar icon and the value "02/15/2021"), and a phone number field (with a phone icon and the value "111-111-1111"). An orange button labeled "Proceed to Login" is positioned below these fields. A text block explains: "The 6-digit OTP is sent to your registered email address to verify your identity. Please enter OTP in below text box and click the Verify OTP button." Below this text is a yellow input field for the OTP, with a key icon on the left and a refresh icon on the right. A timer below the field shows "4 min and 23 sec". At the bottom is another orange button labeled "Verify OTP".

- Once you receive the code, review the Terms and Conditions and scroll to the bottom to click on "I Agree."
- Enter your chosen password twice and you can now login to your portal!

## Reset Password

Password must have,

- At least 8 characters
- At least 1 upper case character
- At least 1 number
- At least 1 special character

- Navigate to the “Forms/Documents” tab and complete the form entitled “Patient Demographics”

The screenshot shows a web browser window at centerforanxietyintouch.insynchcs.com/PatientDocument. The page has a navigation sidebar on the left with the following items: Home / Dashboard, My Profile, Appointments, Messages, Education Material, Forms / Documents (highlighted with a green bar and a '2' notification), Survey Forms, Treatment Plan, Assessment Tools, and Billing. The main content area is titled 'Patient Forms' and contains a table with the following data:

Form Name	Received On	Last Submitted On
Adult Monthly Check-In	06/30/2023	
Adult Demographics	05/05/2023	

- Navigate to the “My Profile” tab and complete “My Details” and “Manage Saved Cards” to add a Credit Card Consent. Please click the green “Save and Submit” when you are done. Scroll down the page and click on Add New Card. Review the credit card consent and click on Sign. Sign digitally and click Accept. Enter your credit card details on the ePayment screen and click Submit.

## ▼ Patient Portal: Feature Overview

The Insync Patient Portal offers a variety of features to help patients manage their healthcare needs. Some of the key sections include:

- Assessments, Forms and Homework: Patients can complete their provider assigned assessments, homework and forms via the portal.
- Appointments: Patients can view upcoming appointments, request to cancel scheduled appointments and receive appointment reminders.
- Messaging: Patients can communicate with their healthcare providers through secure messaging, allowing them to ask questions and receive answers without having to make a phone call or visit the office.
- Bill Pay: Patients can view their bills and make payments online through the Patient Portal.
- Health Education: Patients can access a variety of health education resources, including articles and videos on a wide range of health topics.

## ▼ Benefits of the Patient Portal

Using the Insync Patient Portal offers several benefits to patients, including:

- Convenience: Patients can convey messages to their healthcare providers from anywhere, at any time.
- Efficiency: Patients can request cancellations and make payments online, saving them time and reducing the need for phone calls and office visits.
- Empowerment: Patients can take a more active role in their healthcare by accessing their assessments, forms, billing statements and health education resources at any time.

Overall, the Insync Patient Portal is a valuable tool for patients looking to take a more active role in their healthcare. By providing convenient access to medical records, appointment overviews, and secure messaging with healthcare providers, the Patient Portal can help patients stay informed and engaged in their healthcare journey.

## ▼ Account Summaries, Adding Credit Cards, Making Payments Through the Portal: Easypay

- Go to the Home/Dashboard page to see an overview of your account
- At the top of the Dashboard is a field where you can enter the amount to pay.

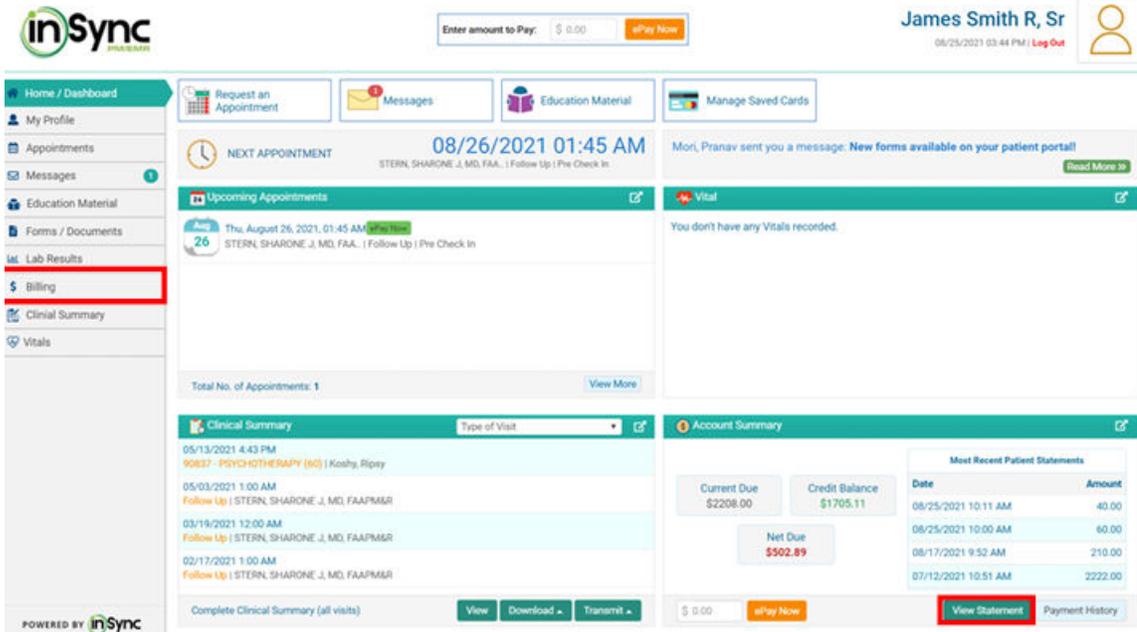
The screenshot shows the inSync Patient Portal Home/Dashboard page. The 'Home / Dashboard' menu item is highlighted in red. At the top, there is a red-bordered box containing the text 'Enter amount to Pay: \$ 0.00' and an 'ePay Now' button. The dashboard shows a 'NEXT APPOINTMENT' for 08/26/2021 at 01:45 AM, a list of 'Upcoming Appointments', and a 'Vital' section indicating no vitals are recorded.

- If you need additional information as to the amount due, you can find that information in the Account Summary section. A similar payment field is available there, which is another way you can make a payment.

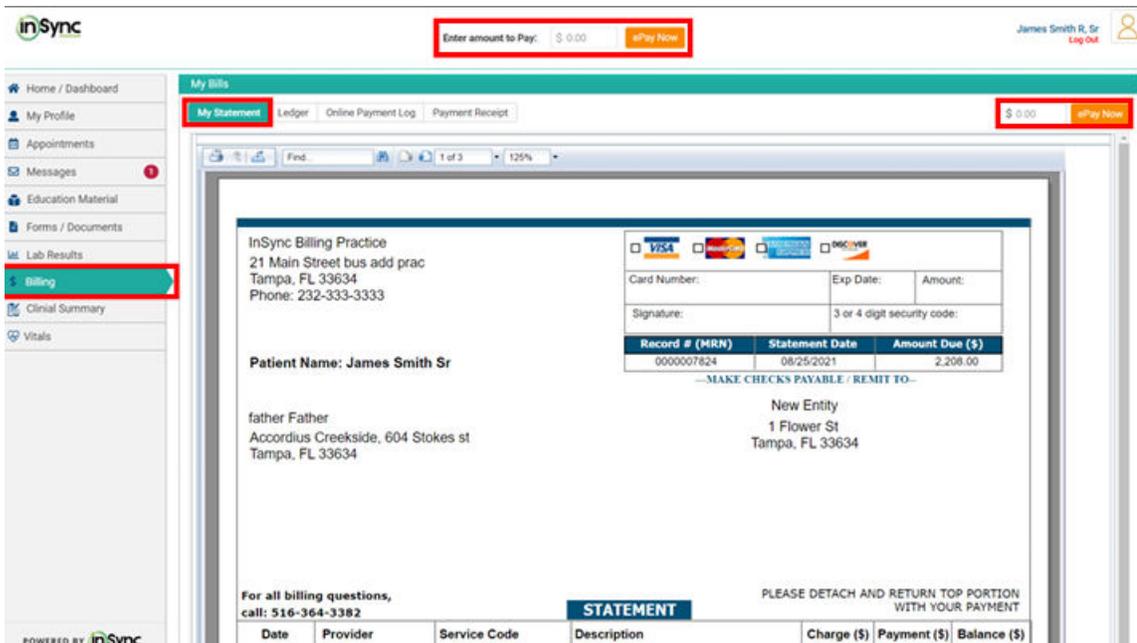
The screenshot shows the inSync Patient Portal Account Summary page. The 'Account Summary' section is highlighted in red. It displays 'Current Due: \$2208.00', 'Credit Balance: \$1705.11', and 'Net Due: \$502.89'. A table of 'Most Recent Patient Statements' is also visible, with columns for Date and Amount. At the bottom, there is a red-bordered box containing the text 'Enter amount to Pay: \$ 0.00' and an 'ePay Now' button.

Date	Amount
08/25/2021 10:11 AM	40.00
08/25/2021 10:09 AM	60.00
08/17/2021 9:52 AM	210.00
07/12/2021 10:51 AM	2222.00

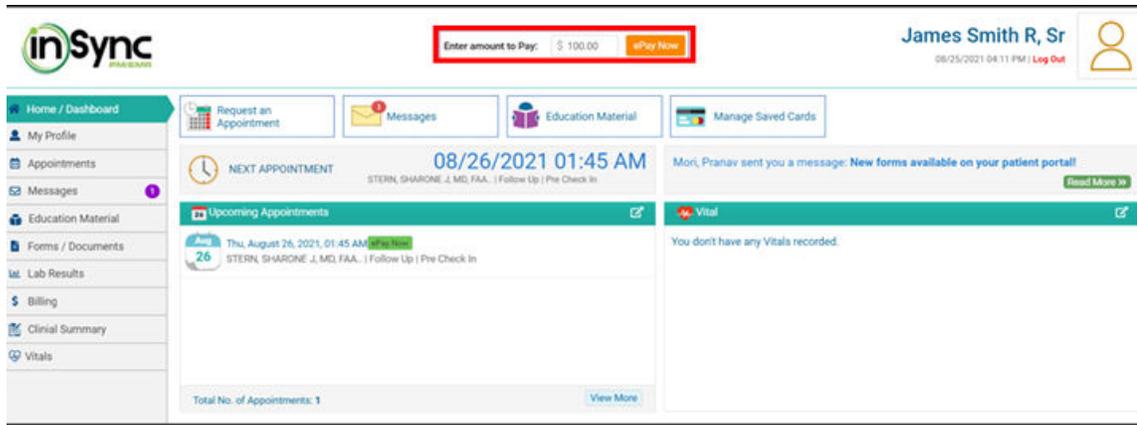
- To obtain a more detailed view of your account, click on the "View Statement" button. Alternatively, you can access the same location by clicking on "Billing" in the left menu.



- Clicking this will direct you to the "My Statement" tab on the billing page, where you can view and/or print your statement. This page also provides two additional locations where payment can be made.



- All payment fields function in the same way. Therefore, regardless of which payment field is used, you can enter the desired payment amount and click the "ePay Now" button.



- The ePayment window will appear where you can select the card you would like to use. If the card is in the system select it and click Pay Now.

**ePayment** ✕

Name: **James Smith R, Sr**

Payment Amount (\$): **100.00**

*\*\* If the card you want to use is not listed, please select 'Add New Card' to enter new payment information*

Select Already Saved Card:\* Use already saved card on file - 0057 (11539) ▼

Billing Entity: ( InSync Billing Practice ) ▼

*\*\* If you wish to make payment without saving card on file, please select 'NO' option for 'Save this card for future payments' and select PAY NOW to continue.*

Pay Now
Manage Saved Cards

- If the card is not in the system click on the dropdown to select Add new card, enter the card information and click Pay Now

**ePayment**
✕

**Name:** James Smith R, Sr

**Payment Amount (\$):** 100.00

*\*\* If the card you want to use is not listed, please select 'Add New Card' to enter new payment information*

**Select Already Saved Card:\***

Select

Add new card

Use already saved card on file - 0057 (11539)

Use already saved card on file - 5439 (11538)

**Billing Entity:**

*\*\* If you wish to make payment without saving future payments' and select PAY NOW to c*

Pay Now

Manage Saved Cards

- The payment will process and direct you to the Online Payment Log tab on the Billing page. The payment details will display in the table.

Enter amount to Pay: \$ 0.00 ePay Now

James Smith R, Sr  
Log Out

- Home / Dashboard
- My Profile
- Appointments
- Messages
- Education Material
- Forms / Documents
- Lab Results
- Billing
- Clinical Summary
- Vitals

My Statement

Online Payment Log

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Payment Receipt

Search Online Payment Log

Transaction Date:  To  Transaction #:  Transaction Status:

Paid Amount (\$):  Source:  Billing Entity:

Card# (ConsentId):

Search
Clear

Source	Transaction Date & Time	Transaction #	Amount Due (\$)	Paid Amount (\$)	Transaction Status	Comment
Portal-Easy Pay	08/26/2021 02:25 PM	25574	2108.00	100.00	Success	Payment made through ConsentId.
Portal-Easy Pay	08/26/2021 01:51 PM	25573	2108.00	100.00	Success	Payment made through ConsentId.
InSync-Easy Pay	08/24/2021 02:22 PM	25560	2193.00	15.00	Success	Payment made through ConsentId.
Portal-Easy Pay	08/10/2021 02:51 PM	25392	2198.89	22.00	Success	SETTLED
Portal-Easy Pay	08/10/2021 02:47 PM	25390	2209.89	11.00	Success	SETTLED
Portal-Easy Pay	08/10/2021 02:45 PM	25388	2209.89	11.00	Success	SETTLED
Portal-Easy Pay	08/10/2021 02:43 PM	25386	2209.89	11.00	Success	SETTLED
InSync-Easy Pay	07/30/2021 07:10 AM	25272	0.00	15000.00	Success	Payment made through ConsentId.

Total Number of Records: 48

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2
3
4
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