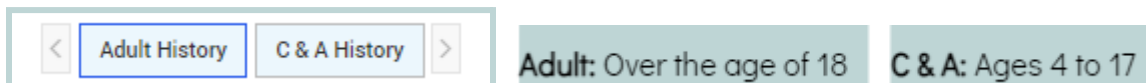


# InSync Patient Portal Help Guide: 2023 File Update

In order to complete forms, and update the information you will need to have your username and password to log into the patient portal. If you have forgotten your password, please click on “*Forgot Password?*” to reset it or contact us if you have any questions.

1. Once logged in click on the **Forms / Documents** tab
  - Review, sign, and submit the *2023 Consents, Authorizations and Policies Form*
    - The form will have required credit card attachment to update the card on file.
  - Review the History Instructions form and complete the *History page*
    - Select the correct page based on the client's age
  - Complete the *Authorization to release information form* (optional)
    - This form should be completed for any provider outside of BZA that you would like to share information with
    - Financially responsible individuals if you are over the age of 18
  - Please review the *HIPAA NOTICE OF PRIVACY PRACTICES AND CLIENT*
2. Under **the My Profile** tab
  - You can update your demographic information, contact details, credit card information, and insurance.
3. Under the **Billing** tab
  - Verify if you have any outstanding balances. You can pay through the portal or contact us to establish a payment plan.
4. Under the **History** tab
  - If you have completed this, please disregard or update any necessary information
  - To complete: Select the corresponding tab based on the client's age. Then complete the information to the best of your knowledge.



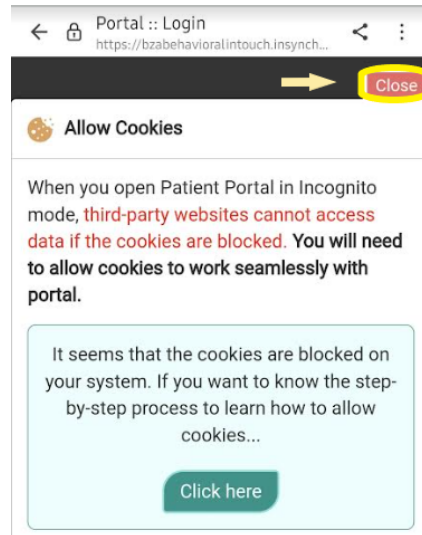
- Click on Save to submit the information

NOTE: If you click on the Save button and get the message below, please go back to the form to answer the questions in red. Example:  Yes  No

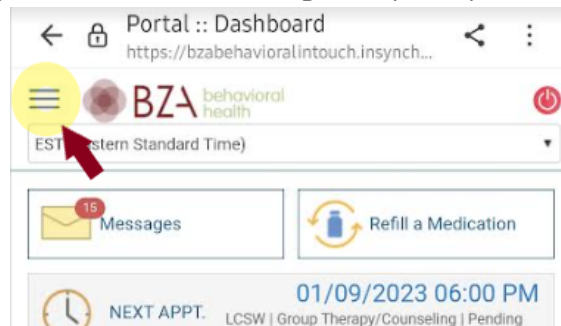
 Please enter mandatory field(s) with red asterisk sign.

## Instructions on a mobile device

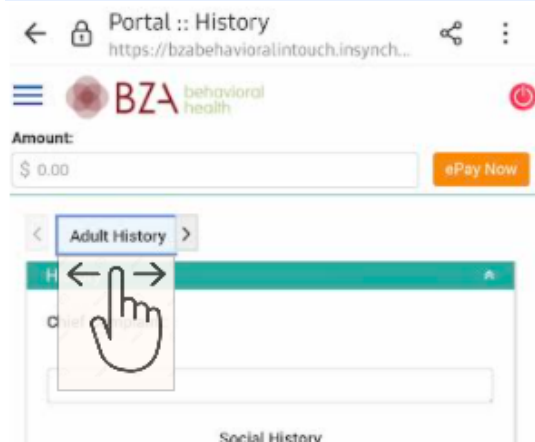
NOTE: This message may pop up when directed to the portal. You can click on close and continue to log in



1. Click on the top left next to the BZA logo to open up the side panel



NOTE: The "C & A" tab will not appear and the arrow function may not work. You may need to swipe to the left in order to complete the C & A information.



If you have any questions or run into any issues while completing this form please email the front office at [info@bzabehavioral.com](mailto:info@bzabehavioral.com)