

# INSTANT ACCESS CLIENT USER GUIDE

## REGISTERING AS A CLIENT AND PRACTICE SET-UP

1. Navigate to <https://www.myinstantaccess.com>
2. Click on Sign up as a Medical Practice (this will be done by the practice administrator)
3. Fill out the Company name or Name of the Medical Group or Practice
4. Fill out the Company or Medical Group or Practice address
5. Click the Box if the credit card billing address of the Medical Practice or Group is the same as the physical address or different
6. If not, leave unchecked
7. Fill out all the Medical Specialties practiced in the Medical Practice or Group
8. Fill in the space with the specific URL you want to use for the Medical Practice (no spaces)
9. Click Next
10. Fill out first and last name of practice administrator or manager
11. Fill out administrators email address
12. Create password; should be at least 8 letters to include at least 1 capital letter, 1 number and 1 special character (!, @, #, \$, %, &, \*)
13. Click on the eyeball if you want the actual password to be visible or hidden
14. Confirm password
15. Enter practice phone number
16. Click on authentication by email address or SMS text messaging
17. Click Next
18. Enter the name of the Doctor in the text box (ex. Joe Smith MD)
19. If there is more than one Doctor in the group or practice, click add Doctor and fill in the next box and repeat until all Doctors are entered (a Doctor must be listed to be searchable in database)
20. Next, put in your credit card information as requested
21. Click Finish
22. Go to registered email box and find confirmation email and click on confirm your account in the body of the email
23. Look for a second email immediately that will include the step-by-step instruction guide for using the software as well as marketing templates to use with your patients and referring Doctors to get them oriented to using the new texting platform (both of these are also available for download from the software platform)
24. Return to <https://www.myinstantaccess.com> and Login
25. Login with administrator email and password to begin setting up your company or group platform
26. Once you are logged in, go to account on left sidebar (or you can also get to account by clicking on your name and picture in right upper corner) and click account there
27. Your general practice info is displayed at right
28. Now is a good time to upload manager's or administrator's picture by clicking change picture and uploading from your computer files and then click save changes at bottom right
29. Next navigate to the Practice Tab at top of account box and click it
30. Here you can edit practice info, change practice logo and add/edit and remove Doctors. Notice that under each Doctor's name is a personal identifier for that specific Doctor in the practice containing the root identifier for the practice followed by a dash and an additional number. Any additional Doctors that you add will automatically be assigned an identifying number. This is useful for marketing as when a patient texts the practice, it is noted that the patient searched for the practice or a specific Doctor
31. Before leaving Practice section, save changes
32. Navigate to Users Tab
33. Here is where you will add the schedulers for practice. They will be the one's logging in each day and capturing the messages as they come in. Each scheduler has a name, picture and email (username). They will set their password when they get their confirmation password for HIPAA purposes. Notice when you get to this page, it already has one administrator user. The admin user is the only one that can make changes to the practice (i.e. changing practice info, adding or removing Doctors names and adding schedulers or a new admin).
34. It is time to add the schedulers that schedule office visits and procedures for the practice.
35. Click on Add Scheduler
36. Register the scheduler with first name, last name, email (username), and phone and then hit the dropdown box by role and select scheduler
37. The new scheduler appears in the box under users. The new user will get an email to confirm registration and prompted to create a unique password
38. Notice that the admin can edit scheduler info or delete the scheduler all together by clicking on the little pencil (to edit) or the "X" (to delete)
39. No save button needed here
40. Navigate to subscription Tab. Here you can see the status of your account trial period as well as the date the trial period ends and the date billing starts. You can cancel your subscription at any time by hitting the orange "Cancel Subscription" button. Confirm that your credit card info is correct and if not, edit and save. You can also edit your credit card billing info at any time. You can also view your payment history
41. Now go to the dashboard by clicking dashboard on the left side panel
42. Here you will find useful statistics and tools
43. You are all set to Logout. Click your name in the right upper corner and choose logout and then click it



Toll-Free Number  
(833) 427-2665

[info@instantaccessolutions.com](mailto:info@instantaccessolutions.com)  
<http://myinstantaccess.com>