

# Patient Profile Management

In this guide, you'll learn how to manage, share, and track patient profiles directly from your Diagnocat homepage.

# Understanding Referral Sections

On our homepage, you'll find two important sections that help you track shared patient info:



## Received Referrals

A list of patients referred to your clinic from other healthcare providers.



## Sent Referrals

A list of patients your clinic has shared with external providers.

These sections make it easy to monitor all incoming and outgoing referrals at a glance.

The screenshot shows the 'Patients' section of the Diagnostics interface. At the top left is the Diagnostics logo. At the top right, there are icons for a globe, a moon, and a user profile for David Johnston. The main heading is 'Patients' with a '+ Add new patient' button. Below this is a navigation bar with 'All 8', 'Received Referrals 0', and 'Sent Referrals 0'. A search bar is labeled 'Search by Patient name or ID'. The main content area displays a grid of eight patient referral cards, each featuring a 3D dental model and patient information:

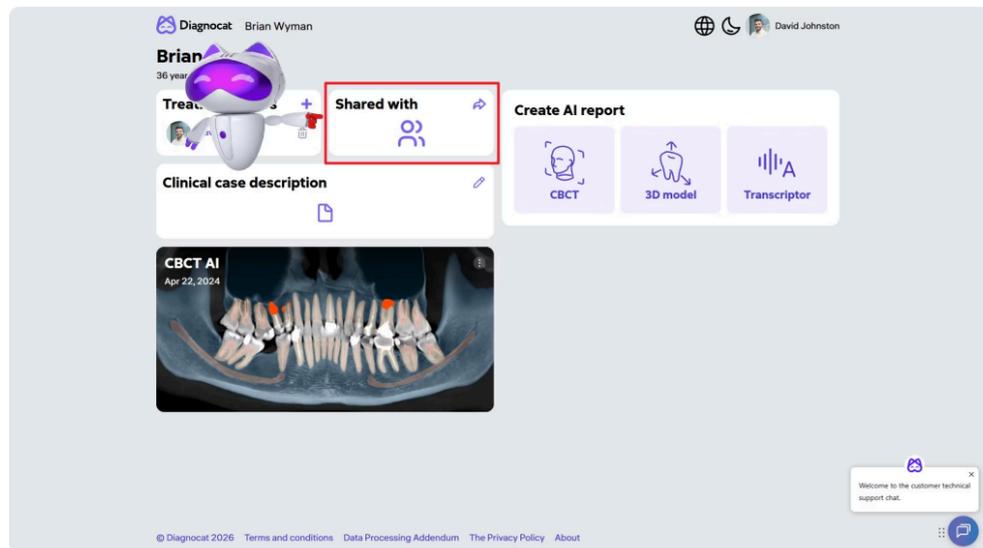
- Liam Norton**: DOB: January 5, 1989; Last modified: February 11, 2026
- Brian Wyman**: DOB: July 28, 1989; Last modified: February 9, 2026
- Cole Williams**: DOB: February 2, 1995; Last modified: February 5, 2026
- Rhonda Roberts**: DOB: February 14, 1978; Last modified: February 5, 2026
- Dustin Graves**: DOB: December 31, 1971; Last modified: February 5, 2026
- Paul Kennard**: DOB: May 20, 1981; Last modified: February 5, 2026
- Katherine Lehmann**: DOB: February 16, 1984; Last modified: February 5, 2026
- Helen Smith**: DOB: April 5, 1978; Last modified: February 3, 2026

Each card includes a profile picture of David Johnston and a set of icons for actions like chat, view, and share. At the bottom, there is a footer with copyright information and a customer support chat window that says 'Welcome to the customer technical support chat.'

# How to Share a Patient Profile

Diagnocat allows you to share patient information securely in just a few steps.

## Steps to Share a Patient Profile

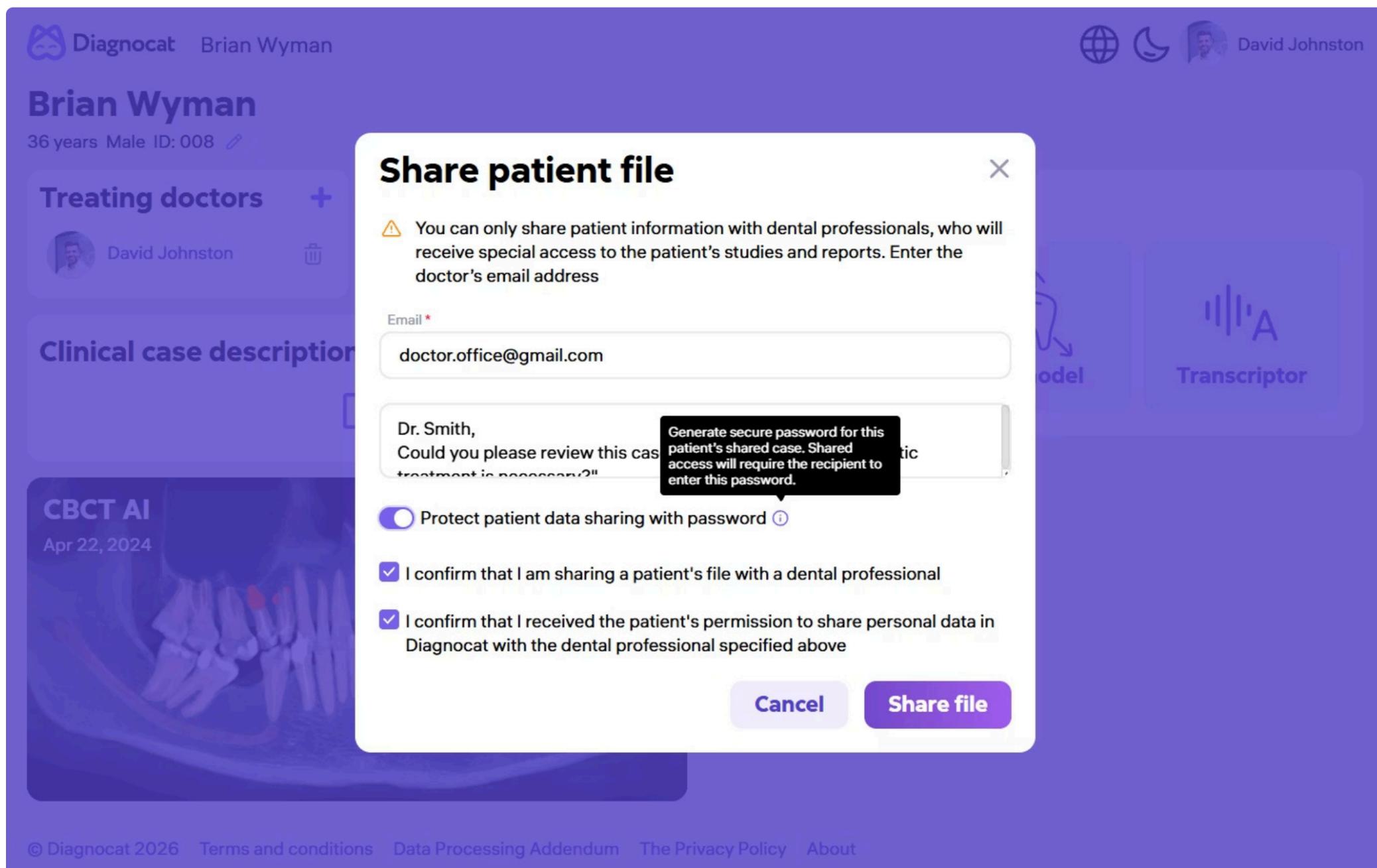


Open the patient's profile from your list

Click the **Share with** button at the top of the page

In the pop-up window:

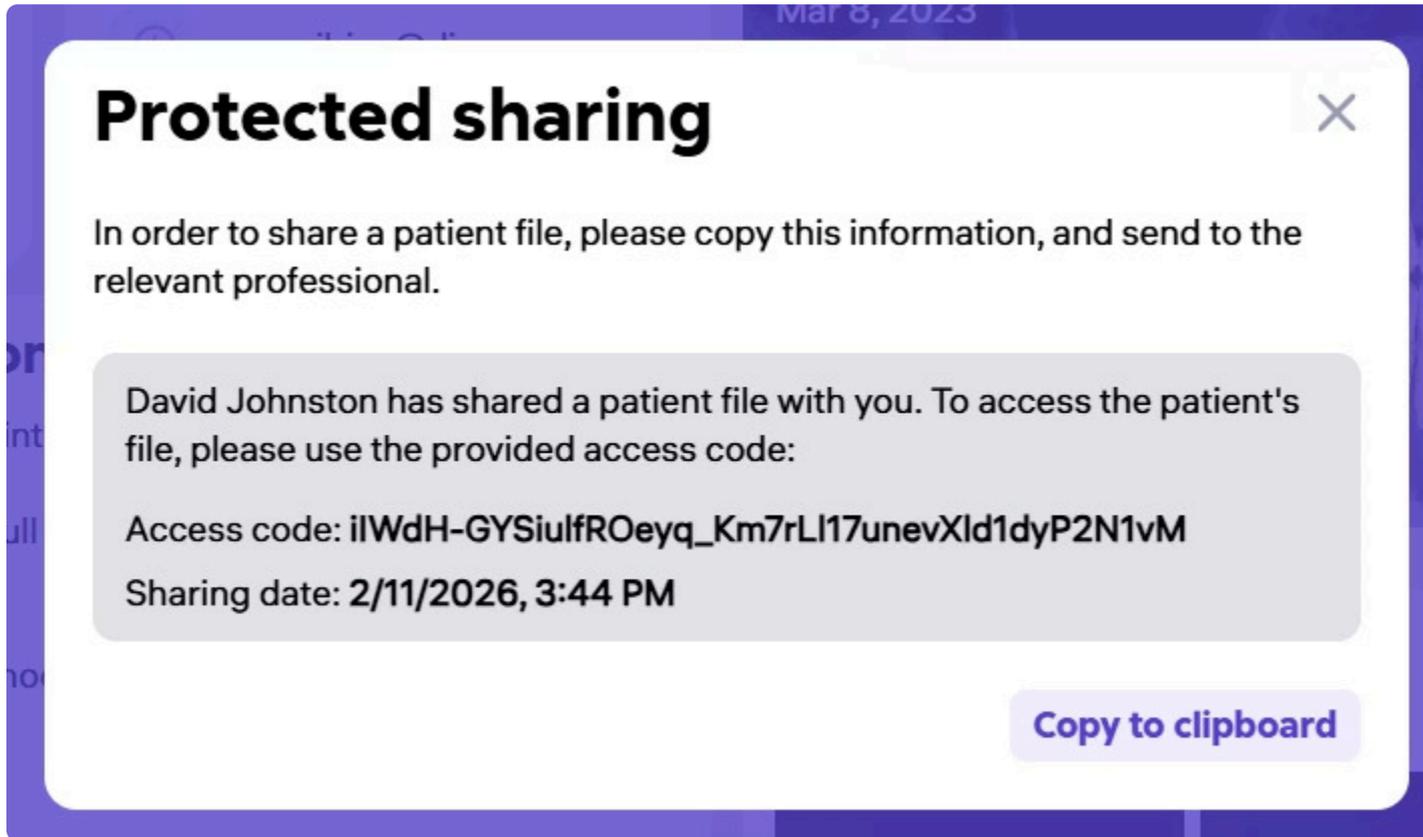
- Enter the recipient's email address
- (Optional) Add a comment for context
- (Optional) Enable data protection by setting a password



Click **Share file** to send the invitation

# Important Step: Save the Access Code

After sharing, an access code will appear.



The screenshot shows a white dialog box with a purple border and a close button (X) in the top right corner. The title is 'Protected sharing'. The main text reads: 'In order to share a patient file, please copy this information, and send to the relevant professional.' Below this is a grey box containing the following text: 'David Johnston has shared a patient file with you. To access the patient's file, please use the provided access code: Access code: ilWdH-GYSiulfROeyq\_Km7rLI17unevXld1dyP2N1vM Sharing date: 2/11/2026, 3:44 PM'. At the bottom right of the dialog box is a purple button labeled 'Copy to clipboard'.

## Don't forget:

- Copy and save this code
- Share the code with the recipient

They will need this code to open the patient data securely.

Once shared, the profile will automatically appear in your **Sent Referrals** section.

# Just for Friends... How the Recipient Accesses the Shared Profile

To open a shared patient profile, the recipient must:

01

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**Open the email notification that contains the profile link**

03

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**Enter the access code you provided**

02

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**Log in to their Diagnocat account**

04

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**View the patient data in their Received Referrals section**

This process ensures secure, controlled access to patient information. Continue to the next guide for more Diagnocat features.



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Chat

Meet

Meet

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Labels +



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Diagnocat

Hi there,

David Johnston shared a patient file with you via Diagnocat, and requests a second opinion on the patient's case.

Details:

- Sender: David Johnston
- Clinic: Dental Clinic
- Date: 2026-02-11 14:44:13

To view the patient's file and provide your opinion, please follow the link provided below:

View patient's file

Reply

Forward

Share in chat

