lanage your Patient Payment Portal

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ollaborateMD's payment portal utilizes the highest form of security to protect the patient's information. he payment portal is our own in-house product which allows payments to post directly into the practice, in eal-time. By providing patients a secure online payment portal, offices are reducing patient calls, increasing illing accuracy, and accelerating patient payments. Plus, patients can view their visit and payment history istantly.

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you're the Auth Rep, follow the steps below to enable, configure, or disable your Payment Portal:

1. Select **Account Administration** > **Services**.
2. Click the **button** next to Patient Payment Portal.
3. The ***Enable Patient Payment Portal*** **box enables or disables this service**.
4. Check the box to choose your **Payment Portal Settings**:
5. **Payment Portal Options**:
   1. **Header Template**: General contact information that will be shown in the header of every page of the Payment Portal.
      1. Click the **Choose File** button to upload a logo.
         
      2. **Enter the required fields**: Practice Name, Address, City, State, Zip code, Phone, or select "copy from practice."
      3. **Optional**: Enter your practice website.
   2. **Statement Template**: Please visit the Statements section to configure electronic statements.
   3. **Payment Options:** Set a minimum payment threshold and enable the Patient Directed Payment Plan feature (only applies to payments of less than the balance due).
      1. Under Patient **Directed Payment Plans**, check the "***Allow patients to set up a patient payment plan from the Payment Portal***" checkbox.
      2. Enter the **Minimum** and **Maximum** amounts that patients can create a payment plan for via the portal (the system defaults to 75 min and 20,000 max).
      3. Select the Payment Plan Terms:
         1. **(Recommended) Allow CollaborateMD to select the best payment plan terms** CMD will select the best 3 options based on the amount owed.

2. **Set up allowed payment plan terms** Select your own payment plan terms by disabling (checking the box(es)) the terms based on owed amounts/installments you don't want available as an option.

Number of Monthly Installments	Minimum Installment Amount	Maximum Installment Amount	Allowed Balances	Disablec
3	25.00	200.00	$75.00 - $600.00	☐
6	25.00	400.00	$150.00 - $2,400.00	☐
12	25.00	600.00	$300.00 - $7,200.00	☐
18	25.00	600.00	$450.00 - $10,800.00	☐
24	50.00	600.00	$1,200.00 - $14,400.00	☐
36	75.00	600.00	$2,700.00 - $21,600.00	☐
48	100.00	600.00	$4,800.00 - $28,800.00	☐
60	100.00	600.00	$6,000.00 - $36,000.00	☐

3. Set the **Minimum** and **Maximum** amount for the installments that patients will set up (the system defaults to $25 min and $600 max).

4. **Change the patient's account type to Payment Plan when a plan is started** Check the box if you wish to set the patient account type to **Payment Plan** when the plan is create

5. **Allow patients to set up multiple payment plans** Check the box if you wish to allow patients to set up more than one payment plan at a time (otherwise, leave it unchecked)

6. Select the account types that can set up a payment plan on the Payment Portal (all account types or select individual account types that can set up payment plans).

7. **Terms and Conditions Summary**: Enter the terms and conditions that will be visible to patients creating the payment plan, or use our default template.

   If you miss a payment, we may charge interest, fees, or cancel the plan.

8. **Full Terms and Conditions**: Enter the full terms and conditions on how your office handles missed payments and cancelations, or use our default template.

   If you will be unable to make your payment on time, please contact us immediately. If you miss a payment, including late payments, declined payments, or payments not made in full, we reser e

> For more information on Patient Directed Payment Plans, please visit our Please reference our Patient Directed Payment Plans Help Articles.

6. **Patient Communications**:

   1. **Allow Patients to receive notification when a new balance is owed** Check the box if you wish to send notifications to your patients regarding new balances set to “Due Patient”. Notifications can be sent by Text message or Email message.

2. **Allow Patients to receive confirmation for successful payment made via the portal** Check the box if you wish to send notifications to your patients once they've successfully processed their payment via the online patient Payment Portal. Notifications can be sent by Text Message or Ema

3. **Allow Patients to receive payment plan installment due reminders** Check the box if you wish to send notifications to your patients that have a Payment Plan installment greater than $0.00 due.

4. **Automatically send payment portal registration invites when adding new patients** Check the box if you wish to send registration invites automatically to your patients when they are created.

5. **Automatically send payment portal registration invites when new balance is owed** Check the box if you wish to send registration invites automatically to your patients when they owe a new balance.

7. Under the **New Balance Notification** tab:

    1. Use the **Allow communication methods** drop-down menu to select how a patient should be contacted.

    2. Use **Allowed times text messages** options to set when you want the text notification to be sent ou to the patient.

    3. Use the default message or type a custom message to send to your patients within the **Text Message** field.

    4. ***Optional***: Variables can be used to auto-populate information related to the patient in the messag **Right-click** and **select one of the available variables to add it to the message**

    > Want to revert back to the default message? Click **Reset to Default Message.**

8. Under the **Payment Confirmation** tab:

    1. Use the **Allow communication methods** drop-down menu to select how a patient should be contacted.

    2. Use **Allowed times text messages** options to set when you want the text notification to be sent ou to the patient.

    3. Use the default message or type a custom message to send to your patients within the **Text Message** and/or **Email** field.

    4. ***Optional***: Variables can be used to auto-populate information related to the patient in the messag **Right-click** and **select one of the available variables to add it to the message**

    > Want to revert back to the default message? Click **Reset to Default Message.**

9. Under the **Payment Plan reminder** tab:

    1. Use the **Allow communication methods** drop-down menu to select how a patient should be contacted.

    2. Use **Allowed times text messages** options to set when you want the text notification to be sent ou to the patient.

    3. Use the default message or type a custom message to send to your patients within the **Text Message** and/or **Email** field.

    4. ***Optional***: Variables can be used to auto-populate information related to the patient in the messag **Right-click** and **select one of the available variables to add it to the message**

    Want to revert back to the default message? Click **Reset to Default Message.**

10. Click **Save**.