

# Payment Portal - Practice FAQs

† Modified on 07/12/2024 12:00 pm EDT

## Do I have to set up the portal before a patient can log in?

As soon as the Portal is activated within CollaborateMD and the merchant credentials are entered, as long as the patient has the URL for the Portal and has registered they can log in.

## How are patients invited to the portal?

Currently, there is no way to invite all patients at once. Patients can be invited to the portal one of three ways:

- 1. Statements.** No setup is required for this. We will automatically include the Payment Portal website on all of your printed or automated patient statements. [Click here](#) for a preview.
- 2. Email invitations.** You can easily invite patients via email from within the Patient or Scheduled section of the application. Manually invite patients via the Patient screen.
- 3. Marketing material.** You can download free downloadable material for your front desk/office. [Click here](#) to download the file.

## What information does a patient need to register on the Patient Payment Portal?

To register for the Payment Portal, the patient will be asked for the following:

- **Account Number:**
- **Last Name:**
- **Date of Birth:**
- **Member ID or SSN:** Must be entered in their patient profile within CMD first in order to register

## What if a patient forgets their password for the portal?

If a patient forgets their password they will have to click on the [Lost your password?](#) link on the Patient Portal and follow the prompts to reset the password using their email address or answer their security questions. Note: Patients will have three attempts to log in successfully before they're locked out for 10 minutes. If the patient doesn't remember their password or their security questions, please [contact Support](#) for assistance.

## What if a patient loses access to the email associated with the portal?

If a patient loses access to the email they associated with the Patient Payment Portal, they must contact their office and they can reset their email address that's associated with the portal from the patient billing options. Note: For steps, please visit our [Change Payment Portal Patient email Help Article](#).

## My patient's statement is different than the claim statement displayed on the

## Portal.

Statements that can be viewed/printed from the Visit History page in the Payment Portal are different from statements that patients may receive monthly. Each statement in the Patient Payment Portal is for a specific claim.

## What if my patients are having issues navigating the portal?

If a patient is having trouble navigating the Patient Payment Portal, please refer to the Help Article. These pages are designed to help Portal Administrators and other employees interfacing with patients understand how patients should use the Online Patient Payment Portal so they can provide support.

## What do I do if my patient can't make a payment on the Portal?

If patients are having problems with the Payment Portal there may be an interruption of service with their portal. Please contact the Accounting department to determine if the portal is active. If patients are successfully submitting payments, but the payments are not impacting their "*amount owed*" please contact CollaborateMD Support immediately so that we can investigate.

## If a patient updates their email address in the portal, does it update their account within CollaborateMD?

If a patient updates their email address on the portal it will only update their Payment Portal Email located within the Patient Billing tab. This does not update the Email address located within the Patient section.

## How do I disable a patient's login access to the portal?

Currently there isn't a way to disable a user from logging into the Portal. However, patients' accounts can be restricted to read-only. This means they will only be able to view their bill, visit history, and payment history.

Take a look at our Patient Help Article to learn more about this setting.

## How are patient payments made in the Portal applied to unpaid claims/charges/installments?

Patient payments made in the Patient Payment Portal are applied the same way a payment gets applied in CollaborateMD, if applied automatically. Payments will be applied to the oldest charges that are set to due patient and/or oldest payment plan installments based on the due date.

## What kind of payments are supported by the Payment Portal?

Currently only credit card payments and debit cards that can be run as credit cards are supported. ACH payments are not supported.

We support the following credit cards: Visa, MasterCard, Discover, American Express, Diners Club International, JCB, Wright Express, and Voyager.

## How long does it take for payments made through the Portal to appear in CollaborateMD?

Payments made in the Payment Portal will be reflected as "applied payments" on the patient's account immediately in the CollaborateMD database.

## Can I view patient information or make/apply payments using the Online Payment Portal?

No, the Patient Payment Portal cannot be used by CMD users to make or apply payments.

## How can I exclude account credits from appearing on the portal?

Currently there isn't an option to prevent account credits from appearing on the Portal.

## What are the login credentials for the Payment Portal?

The login credentials for the Payment Portal is the same as your CollaborateMD username and password. Note: All users can log into the admin side of the payment portal, but only users with the Payment Portal configuration permission set to 'Allow' can save changes.

## If I disable the Payment Portal but a patient has already registered, what will happen when they try to log in?

The patient will receive a warning message stating, "The Payment Portal access is no longer available for your doctor's office. Please contact the office regarding payment inquiries."

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