Payment Portal - Practice FAQs

Last Modified on 08/17/2026 2:31 pm EDT

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

No. 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?

Patients can be invited to the payment portal one of the following ways:

1. **Statements:** No setup is required for this. We will automatically include the Payment Portal website o all of your printed or automated patient statements. Click here for a preview.
2. **Email invitations (Individually):** You can easily invite patients individually via email from within the Patient or Scheduler section of the application. Manually invite patients via the Patient screen (or patient tab in the scheduler). Click here for instructions.
3. **Email invitations (Batch):** You can also invite patients in a batch via email from within the AR Control section of the application via batch actions. Click here for instructions.
4. **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 Suppor 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

ptions. 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.

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

What if my patients are having issues navigating the portal?

f a patient is having trouble navigating the Patient Payment Portal, please refer to the Help Article. These ages are designed to help Portal Administrators and other employees interfacing with patients understan ow 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?

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

f a patient updates their email address in the portal, does it update their ccount within CollaborateMD?

f a patient updates their email address on the portal it will only update their Payment Portal Email located vithin 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?

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

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

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

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

What kind of payments are supported by the Payment Portal?

urrently only credit card payments and debit cards that can be run as credit cards are supported. ACH ayments 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 patients 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.*"

Can I still use the Payment Portal If I can't enable the In-App Credit Card Processing feature in CMD?

Yes, practices without in-app payment processing (IPP) can still offer patients e-statements and access to the Payment Portal. CollaborateMD offers practices and billing services who can't implement IPP for their customers, a way to still offer e-statements and the Payment Portal. This allows them to add a payment link (such as a text-to-pay link) from your own payment processor. Patients will still get the complete Payment Portal experience including visit history, payment history, and current balance but when they select Pay Now, they'll be directed to your configured payment link to complete payment.

Please note that because there is no direct integration between the payment link and our system, payment made by patients will not reflect in their accounts immediately like they would via IPP, and they could take 24 to 48 hours to post to your CMD account.

If you're unable to use In-App Payment Processing but would like to offer e-statements and the Payment Portal to your patients, contact your account manager.