nviting Patients to the Portal

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low that you have configured your Payment Portal, you should invite patients! Office staff can ommunicate information about the payment portal via email, statements and/or free downloadable narketing material.

1. **Send 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 (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.