

Inviting Patients to the Portal

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Now that you have configured your Payment Portal, you should invite patients! Office staff can communicate information about the payment portal via email, statements and/or free downloadable marketing 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.
 4. **Marketing material.** You can download free downloadable material for your front desk/office. [Click here](#) to download the file.
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