Payment Portal Registration

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Send Payment Portal Invite

This section is only visible for accounts that have the Online Payment Portal enabled. Once enabled, proceed to the Patient section to invite a patient to the Payment Portal via email.

Who can use this feature?

Users with the Payment Portal Invite permission.

1. Select **Patient** > **Patient**.
2. Use the **Search** field to search through your patients.

   Place a check in the "***Include inactive patients***" box to include inactive patients in your search results.

3. Select the **Patient**.
4. Click the **Billing Info** tab.
5. Navigate to the **Payment Portal Options** section.
6. Click the **Send Invite Now** button.
7. Verify the email that displays in the pop up.
8. Click **Send**.
9. Click **Save**.

   Looking for instructions on how patients can register to the payment portal? Visit our **Patient Payment Portal Help Articles** for detailed steps on how patients can register for the payment portal.

Check Payment Portal Registration

Follow the steps to confirm a patient's registration status for the Payment Portal.

1. Select **Patient** > **Patient**.
2. Use the **Search** field to search through your patients.

   Place a check in the "***Include inactive patients***" box to include inactive patients in your search results.

3. Select the **Patient**.
4. Click the **Billing Info** tab.
5. Navigate to the **Payment Portal Options** section.
6. If you see **Patient has not completed the registration process for the Payment Portal**, this means the patient hasn't registered yet.
7. ***Optional***: You can send additional registration email invites by clicking the **Send Invite Now** button.
8. Verify the email that displays in the pop-up.
9. Click **Send**.

Set Read-Only Access to Payment Portal

You have the option to restrict patients to read-only mode within the Payment Portal. This will allow the patient to only view their charge information; they will not be able to make payments via the portal.

1. Select **Patient** > **Patient**.
2. Use the **Search** field to search through your patients.

   Place a check in the "***Include inactive patients***" box to include inactive patients in your search results.

3. Select the **Patient**.
4. Click the **Billing Info** tab.

5. Navigate to the **Payment Portal Options** section.
6. Place a check in the **Restrict patient to read-only access** box.
7. Click **Save**.

Remove a Patients Ability to create a Patient Directed Payment Plan from the Portal

You have the option to restrict a patient's ability to set up a Patient Directed Payment Plan within the Payment Portal. This will remove the patient's ability so they are not able to make a payment plan via the portal.

1. Select **Patient** > **Patient**.
2. Use the **Search** field to search through your patients.

> Place a check in the "***Include inactive patients***" box to include inactive patients in your search results.

3. Select the **Patient**.
4. Click the **Billing Info** tab.
5. Navigate to the **Payment Portal Options** section.
6. Place a check in the **Do not allow this patient to create Payment Plans in the Payment Portal** box.
7. Click **Save**.

Change Payment Portal Statement Notifications

Follow the steps to confirm a patient's registration status for the Payment Portal.

1. Select **Patient** > **Patient**.
2. Use the **Search** field to search through your patients.

> Place a check in the "***Include inactive patients***" box to include inactive patients in your search

results.

3. Select the **Patient**.
4. Click the **Billing Info** tab.
5. Navigate to the **Payment Portal Options** section.
6. If you see **Patient has not completed the registration process for the Payment Portal**, this means the patient hasn't registered yet.
7. ***Patient has decided not to receive electronic statements:*** Click **Change** to update the preferred communication method chosen by the patient for electronic statement notifications.
8. ***Patient has decided not to receive electronic payment plan statements*** Click **Change** to update the preferred communication method chosen by the patient for electronic payment plan notifications.
9. Click **Send**.

Change Payment Portal Patient email

Have a patient who lost access to the email associated with their online payment portal account? You can reset the patient's payment portal email and allow them to reset their own password with a new email address.

Follow the steps to change the patient's email associated with the Payment Portal.

1. Select **Patient** > **Patient**.
2. Use the **Search** field to search through your patients.

   Place a check in the "***Include inactive patients***" box to include inactive patients in your search results.

3. Select the **Patient**.
4. Click the **Billing Info** tab.
5. Navigate to the **Payment Portal Options** section.

6. Click the `Change Payment Portal Email` option.

7. Enter the new email address.

8. Click **Reset Email**.

9. Click **Send**.

Change Your Receipts Opt-In Options

Follow the steps to update a patient's options to receive receipts.

1. Select **Patient** > **Patient**.

2. Use the **Search** field to search through your patients.

> Place a check in the "***Include inactive patients***" box to include inactive patients in your search results.

3. Select the **Patient**.

4. Click the **Billing Info** tab.

5. Navigate to the **Payment Portal Options** section.

6. If you see **Patient has decided not to receive receipts**, this means the patient hasn't opted-in to receiving receipts yet.

7. Click **Change** to update the preferred method to receive receipts chosen by the patient.

8. Click **Save**.
