

# Send Payment Portal Invite

† Modified on 08/31/2026 4:39 pm EDT

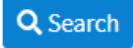
Send Payment Portal Invite will allow you to invite a batch of patients to the Payment Portal via email.

 Before using this option the Payment Portal must be enabled and configured within the Services section.

1. Select **Patient > A/R Control**.
2. Enter your **Search Criteria** or **Load a Search Filter**.
3. Click the **Charge Status** drop-down menu and select your status(es) **Pending Patient, Balance Due Patient, etc...**

 Use the **Payment Portal Status** filter, located at the bottom of the filter options, to select which patients you want to send the invites to:

- **Invitation Not Sent:** send invites to patients who have never received one *e.g., all patients during the initial payment portal setup*).
- **Invitation Sent But Not Registered:** Resend invites to patients who have received an invite but have not yet registered.
- **Registered:** Send invite to patients who have already registered for the Payment Portal.

4. Click 
5. The search results will display patients who match your search terms.
6. Place a checkmark next to the patient(s) you want to include in a specific batch action.
7. Click  and select **Send Payment Portal Invite** from the drop-down menu.
8. Click **Send Invite**.

 The selected patients will receive an email invitation to the Payment Portal. Patients who have already received an invite will receive another invite as long as the previous invite was at least 30 days ago. Patients with no email on file will not receive an invite.