

Email Receipts

† Modified on 06/12/2024 11:58 pm EDT

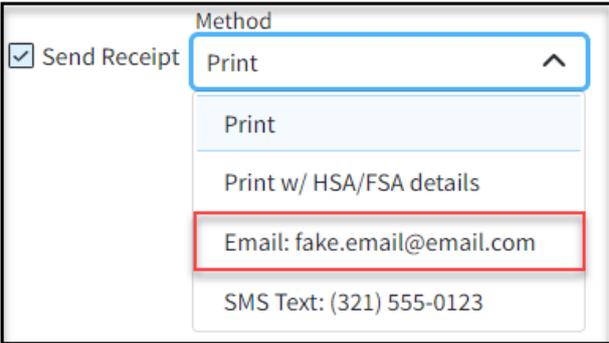
Email/Text Receipt While Collecting a Payment

The CollaborateMD **Payment > Post** section allows users to email or text a receipt while collecting/posting a patient payment.

 You can also email or text receipts when posting a payment from the Scheduler or Claim sections.

Important: Please note that to use the text receipt option, an **Auth Rep** must first turn on text receipts from the Practices section. For more information on turning on text receipts or editing receipt options, visit our [Payment Defaults Help Article](#).

1. Select **Payment > Post**.
2. Fill in the option for **Patient Payment**.
3. Enter your Patient's Payment
4. Check the **Send Receipt** box
5. Select the **Email** option from the dropdown (or SMS Text if sending via text).



The screenshot shows a form with a checked box labeled "Send Receipt". To its right is a dropdown menu titled "Method". The dropdown is open, showing four options: "Print", "Print w/ HSA/FSA details", "Email: fake.email@email.com", and "SMS Text: (321) 555-0123". The "Email" option is highlighted with a red rectangular box.

6. Once the payment is saved the receipt will be emailed.

 Please note that the patient must first opt-in to receive email receipts. For more information on opting-in, visit our [Change Your Receipt Opt-In Options Help Article](#)

Email/Text Receipt From the Payment Tracker

The Payment Tracker screen allows you to pull up previously posted patient payments and email or text the receipts associated with those payments.

Important: Please note that to use the text receipt option, an **Auth Rep** must first turn on text receipts from the Practices section. For more information on turning on text receipts or editing receipt options, visit our [Payment Defaults Help Article](#).

1. Select **Payment > Payment Tracker**.
2. Enter your desired **Search Criteria** or [Load a Search Filter](#).
3. Click **Search**.
4. Click the **Send** link (in the Receipt column) to open the print/send dialog box for the patient payment to be printed.
5. Select the **Email** option (or SMS Text option if sending via text).

 Please note that the patient must first opt-in to receive email receipts. For more information on opting-in, visit our [Change Your Receipt Opt-In Options Help Article](#).

Email/Text Receipt From the Patient Activity Record

The **Patient Activity** screen also lets you email or text receipts associated with previously posted patient payments directly from the activity's Payment History.

Important: Please note that to use the text receipt option, an **Auth Rep** must first turn on text receipts from the Practices section. For more information on turning on text receipts or editing receipt options, visit our [Payment Defaults Help Article](#).

1. Select **Patient > Patient**.

2. Use the **Search** field to search through your patients.
3. Select the **Patient**.
4. Click  **Activity** ▾
5. The **Activity** record will open in a new window.

 You can also access the Activity screen from the Claim, Manage Account, Scheduler, and View Payment sections.

6. Expand the **Payment History**.
7. Right-click the row for the patient payment to be emailed/texted.
8. Click **Email Receipt** (or the SMS Text Receipt option if sending via text).
9. Verify your email address and click **Save**.

 Please note that the patient must first opt-in to receive email receipts. For more information on opting-in, visit our [Change Your Receipt Opt-In Options Help Article](#)

Email/Text Receipts From the Payment Portal (Patients)

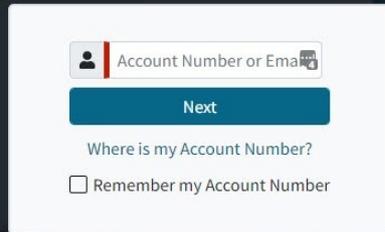
The **Patient Payment Portal** allows patients to email or text their receipts associated with previously posted payments directly from the portal's Payment History.

1. Patients can visit <https://www.paystatementonline.com>
2. Log in with your CollaborateMD Patient Account Number or email.

 If you have not registered, begin the registration process using the **Patient Account Number** found in the top right corner of your statement or provided in the Payment portal invite email.

Payment Portal

Make Payments Instantly and Securely



The screenshot shows a login form with a white background and a dark blue border. At the top left is a small icon of a person. To its right is a text input field containing the placeholder text "Account Number or Email". Below the input field is a dark blue button with the word "Next" in white. Underneath the button is the text "Where is my Account Number?". At the bottom of the form is a checkbox with the label "Remember my Account Number".

3. Click **Next**.
4. Enter your Password and click **Sign In**.
5. Click **Payment History**.
6. Select **Send Receipt** for the payment to be printed.
7. Click **Email Receipt** (or the SMS Text Receipt option if sending via text).

 Please note that the patient must first opt-in to receive receipts. Patients can update this from the Payment Portal by navigating to Preferences > Change Communication Settings.