

Email/Text Receipt While Collecting a Payment

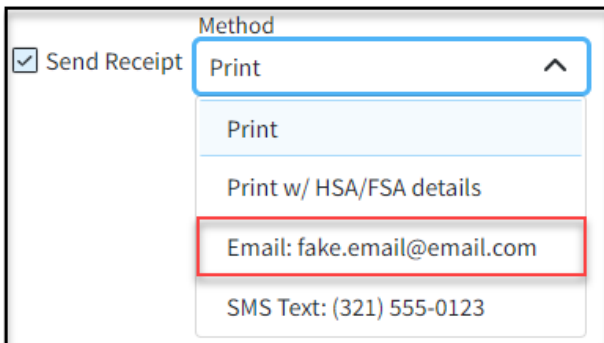
† Modified on 06/12/2024 11:54 pm EDT

The CollaborateMD **Payment > Post** section allows users to email or text a receipt while collecting/posting 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" and a dropdown menu titled "Method". The dropdown menu is open, showing several options: "Print", "Print w/ HSA/FSA details", "Email: fake.email@email.com" (highlighted with a red box), and "SMS Text: (321) 555-0123".

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](#)