Change Payment Portal User

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You have the option to choose who the Payment Portal user is. CMD will then use this person's email address and cell phone number for Payment Portal communications. This includes the Payment Portal invite, receipts, and statement notifications.

Follow the steps to change the user 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 Payment Portal User dropdown.
7. Select your user (Patient, Primary/Secondary/Tertiary Insured, Guarantor).
8. Click **Save**.

> ⚠ Please note:
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> - **The email only updates automatically for new registrations.** If a patient is already registered with the Payment Portal, switching the Payment Portal user to the guarantor will **not** change the email on file. That email was set when the patient registered, and CMD doesn't update it automatically. To send Payment Portal email to the guarantor, use the **change email** option to update it yourself. The email changes automatically only when the patient hasn't registered yet.
> - **Changing the user changes the cell phone number.** This includes switching a registered patient to the guarantor. Text message opt-ins belong to a specific phone number, so the guarantor's number needs its own opt-in, even if the patient's number has already opted in. Until the guarantor opts in, text messages won't reach them.