

How do I send or resend individual OnPatient invites?

07/08/2024 7:40 pm EDT

When you send an OnPatient invite, your patient has 7 days to accept your invitation to connect. If your invite is not accepted within the week, your patient cannot connect with you via OnPatient and you will need to resend the invite. You can send individual invitations through the patient's [chart](#) or the [appointment window](#).

This article will cover sending individual invitations. For information on other ways you can send invitations see our articles below:

- [Bulk Inviting All Patients to OnPatient](#)
- [Automatically Sending OnPatient Invitations through Reminders and Appointment Confirmation](#)
- [OnPatient Settings: Automatically Inviting New Patients to OnPatient after their First Appointment](#)

Sending Invitation through the Chart

To begin, navigate to your patient's chart and select **OnPatient Access** on the left-hand navigation menu. Within the OnPatient Access page, you'll see the OnPatient status for your patient.

The screenshot shows a patient's chart for Jenny (Jen) Harris. The left-hand navigation menu has 'onpatient Access' highlighted with a green bar and a black arrow. The main content area shows the patient's information and a message: 'onpatient not enabled for patient'. Below this, it lists required information: Social Security Number (XXX-XX-1111), Date of Birth (Feb. 11, 1980), and Phone Number ((443) 555-5555). An 'Access History' table is also visible.

Email	Enabled by	Activated on	Disabled
sample@sample.com	By: James Smith On: May 17, 2022, 3:04 p.m.	Pending...	Revoke invite
sample@sample.com	By: James Smith On: May 16, 2022, 10:12 a.m.	May 16, 2022, 10:13 a.m.	By: James Smith On: May 17, 2022, 3:04 p.m.
sample@sample.com	By: James Smith On: May 16, 2022, 10:09 a.m.	Access revoked before activation	By: James Smith On: May 16, 2022, 10:12 a.m.

If your patient does not have OnPatient enabled, you'll see an additional section that will inform you that your patient cannot use OnPatient, for example, if they are missing an email address.

Missing Identifiers for Michelle Harris

This information is needed to allow your patient to securely access their DrChrono EHR records through onpatient.

Please provide an email for Michelle Harris.

Email

Close

Save Identifiers

To invite a patient to OnPatient, you need their email and either the patient's social security number or their date of birth and phone number.

onpatient not enabled for patient

The following information is required to connect with onpatient:

✓	Social Security Number	XXX-XX-2222
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or

✓	Date of Birth	Aug. 17, 1997
✓	Phone Number	(650) 555-5555

If you satisfy all the requirements, click on the **Enable Patient Access** button in the upper right-hand corner and you will be able to see your access history updated with a **Pending...** status. When your patient accepts your OnPatient invite, you'll be informed of the patient's access history. If you need to resend an invitation, click **Revoke Invite** and then **Enable Patient Access** again.

Access History ⓘ

Email	Enabled by	Activated on	Disabled
sample@sample.com	By: James Smith On: June 4, 2021, 9:36 a.m.	Pending... ⓘ	Revoke invite
sample@sample.com	By: James Smith On: June 4, 2021, 9:22 a.m.	June 4, 2021, 9:27 a.m.	By: James Smith On: June 4, 2021, 9:36 a.m.

Sending Invitations through the Appointment Window

You can send an individual OnPatient invitation to a patient through the appointment window. The requirements for invitation are the same as described above. You need the patient's **email address** and either the patient's **social security number** or their **date of birth** and **phone number**. The information needs to be entered before you send the invitation.

In the appointment window click the arrow (



) icon to send the invitation.

Schedule Appointment



Appointment

Billing

Eligibility

Vitals

Growthcharts

Flags

Log Comm.

Revisions

Custom Data

MU Helper

Type Appointment

Video Visit

Walk-in

Transition of Care

Referral

Missing Patient Address

Patient Statement Balance: \$150.00 [Generate Statement](#)

5 past appointments

Provider: Dr. James Smith

Supervising: Brendan Wilberton

Patient: Tim Patient - 06/05/2023

Office: Office 1

Reason: Evaluation

Profile: Evaluation

Scheduled: 09/20/2023 Time: 09:00AM

Eligibility Profile: -----

Exam: Exam 1

Provider: US/Mountain

Timezone:

Duration: 10 minutes Allow overlapping

Color:

Notes:

Status:

> 24h

- Consent Forms:
- HIPAA Data Use Agreement (default)
 - No Show Policy (default)
 - Telehealth Consent (default)

[View Clinical Note](#)

[View All Appointments](#)

Recurring Appointment A scheduled appointment cannot be converted to a recurring series.

Practice Chart