How do I send or resend individual OnPatient invites?

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.

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.

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

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 ▾]

Patient [Tim Patient - 06/05/2023 ▾] ➕ 🖊 ↗ ←

Invite to onpatient

Reason: Evaluation 💡 Ⓖ

Scheduled: [09/20/2023] **Time** [09:00AM] ⬍

Provider Timezone: US/Mountain

Duration: [10] minutes ☐ Allow overlapping

Notes: [   ]

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

Supervising [Brendan Wilberton ▾]

Office: [Office 1 ▾] ➕ 🖊

Profile: [Evaluation ▾]

Eligibility Profile: [--------- ▾]

Exam: [Exam 1 ▾]

Color: [   ]

Status: [▾]

> 24h

[🖊 View Clinical Note]

[View All Appointments]

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

Practice Chat