Sending and Resending Individual OnPatient Invitations

Last modified on 06/03/2025 2:40 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 to 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

Required Patient Information

When OnPatient is not enabled for a patient, the system displays an additional information section explaining why the patient cannot access OnPatient services. Common reasons include:

- Missing email address in patient record
- Incomplete demographic information
- Other data validation issues

Before enabling OnPatient Access, verify the patient record contains:

Required Fields:

- Valid email address

Authentication Requirements (one of the following):

- Patient's Social Security Number, OR
- Patient's Date of Birth AND Phone Number

Sending an OnPatient Invitation from the Patient Chart

Locating Patient Access Status

The OnPatient Access status for a patient can be found in two locations within the patient chart:

1. **Patient Header**: The status is displayed directly in the patient header
2. **OnPatient Section**: Located on the left menu side in the patient chart for detailed access management

Sending the Invitation

To send an OnPatient Access invitation to a patient:

1. Navigate to the patient chart
2. Select **OnPatient Access** from the left-hand navigation menu
3. The OnPatient Access page will display the current status for the selected patient

4. Use the available controls on this page to manage invitation settings and send invitations
5. The system will update the access history with a **Pending.** status
6. Patient will receive an email invitation to activate their OnPatient account

Monitoring Invitation Status

The access history section displays real-time status updates:

- **Pending**: Invitation sent, awaiting patient response
- **Active**: Patient has successfully activated their account
- **Expired**: Invitation has exceeded the time limit

Managing Invitations

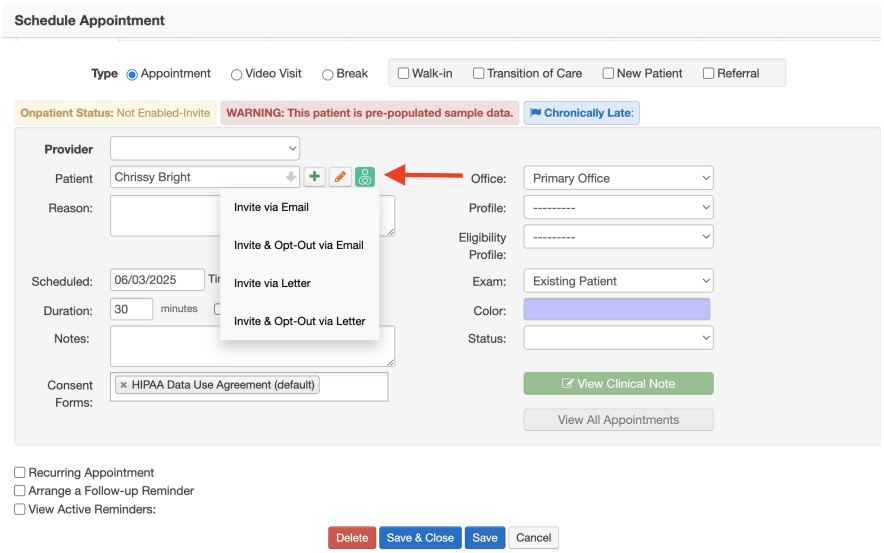
To Resend an Invitation:

1. Click **Revoke Invite** to cancel the current pending invitation
2. Click **Enable Patient Access** to generate and send a new invitation
3. Monitor the access history for updated status

Sending an OnPatient Invitation from the Appointment Window

You can send an individual OnPatient invitation directly from the appointment window. To do so, you'll need the same information outlined above: the patient's email address and either their Social Security number, or their date of birth along with their phone number. Ensure all required information is entered before sending the invitation.

In the appointment window click the arrow () icon to send the invitation.


Schedule Appointment
Type
Appointment
Video Visit
Break
Walk-in
Transition of Care
New Patient
Referral
Onpatient Status: Not Enabled-Invite
WARNING: This patient is pre-populated sample data.
Chronically Late:
Provider
Patient
Chrissy Bright
Reason:
Scheduled:
06/03/2025
Duration:
30
minutes
Notes:
Consent Forms:
HIPAA Data Use Agreement (default)
Invite via Email
Invite & Opt-Out via Email
Invite via Letter
Invite & Opt-Out via Letter
Office:
Primary Office
Profile:
Eligibility Profile:
Exam:
Existing Patient
Color:
Status:
View Clinical Note
View All Appointments
Recurring Appointment
Arrange a Follow-up Reminder
View Active Reminders:
Delete
Save & Close
Save
Cancel