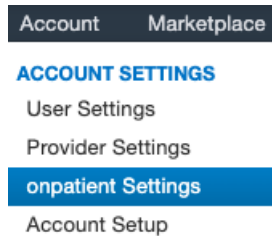


Bulk Inviting All Patients to OnPatient

Last modified on 04/08/2025 4:24 pm EDT

In DrChrono, there is a way to bulk invite all your patients to OnPatient with the click of a single button. This option is found within the OnPatient Settings section of your account.

To begin, mouse over **Account** on your DrChrono navigation bar and select **OnPatient Settings**.



To invite a patient to OnPatient, you will 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

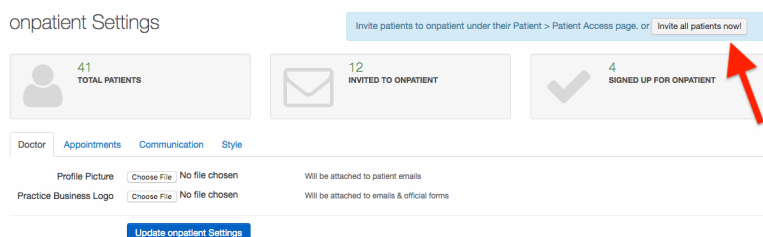
Within OnPatient Settings, there will be a button under the Doctor tab titled **Invite all patients now!**. When you select this button, all patients who have the above information on record will be sent an invitation to sign up for OnPatient.

1. If providers have the share patients permission enabled, all eligible patients will receive the invitation.

Example

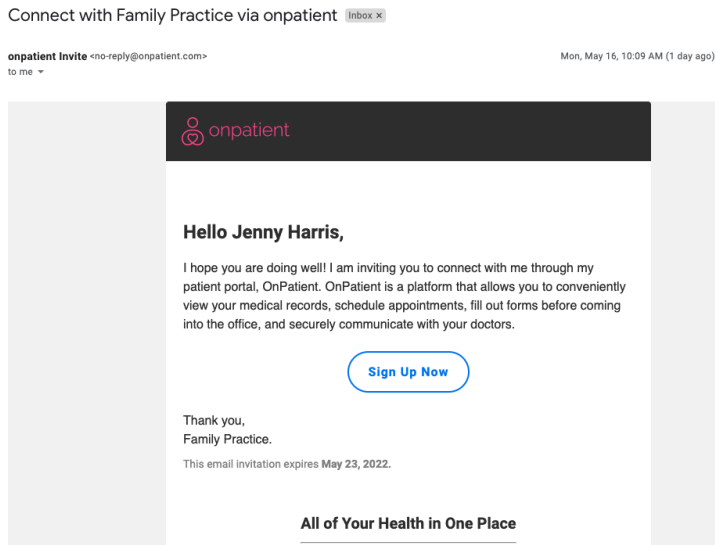
- Dr. Who and Dr. What share patients.
- Patient A - primary provider is Dr. Who.
- Patient B- primary provider is Dr. What.
- Dr. Who bulk invites all patients = email invites will be sent to both Patient A and Patient B if they have the eligible fields entered in their charts.

2. Patients who have already been invited AND have activated their OnPatient account will not receive an invitation.



A Preview of an OnPatient Invite

The following image is an example of the email your patients will receive.



When your patient clicks the **Sign Up Now** link in the email, they'll be directed to the OnPatient website. They will be asked to register for an account and verify their identity via either their social security number or date of birth and phone number. When they register via the emailed link, they'll automatically be associated with you as their provider.

