

Manage Payment Methods

Last modified on 09/24/2026 4:43 pm EDT



About the new OnPatient portal experience

The redesigned OnPatient portal experience is currently in beta and available to select early-access users. This knowledge article may be updated as the portal experience evolves.

Manage payment methods | Add a payment method

Manage payment methods

Do one of the following:

- Select **Billing > Payment Methods**.
- Select **Go to Billing** on the **Recent Bill** tile on the **Dashboard** and then select **Payment Methods**.

The default payment method is shown first. You can't delete a payment method if it's associated with a payment plan or if it's the only saved card.

Select **Edit** to make changes to an existing payment method.

The screenshot displays the OnPatient portal interface. On the left is a sidebar with a 'Collapse Menu' button and navigation links: Home, Appointments, Billing (highlighted with a red notification badge), Messages, Care Team, Health Records, and Settings. The main content area is titled 'OnPatient' and shows the 'Payment Methods' section for 'Practice: Sanctum Sanctorum'. A left-hand menu within this section lists 'Statements', 'Payment History', 'Payment Methods' (selected), and 'Payment Plans'. The 'Payment Methods' table has a search bar and the following data:

☐	Status	Credit Card	Nickname	Action
☐	Default Payment Plan	**** 1234	My Debit Card	Edit Delete
☐	Payment Plan	**** 8888	Travel Rewards Card	Edit Delete
☐		**** 5678		Edit Delete
☐		**** 0000		Edit Delete

Showing 4 of 4 records You have reached the end.

At the bottom of the interface, there is a footer with copyright information '© 2025 EverCommerce. All rights reserved.', links for 'Terms' and 'Privacy', and buttons for 'FHIR API' and 'Knowledge Base'. The user's name 'Alice Bruce' and a 'Log Out' button are visible in the bottom left of the sidebar area.

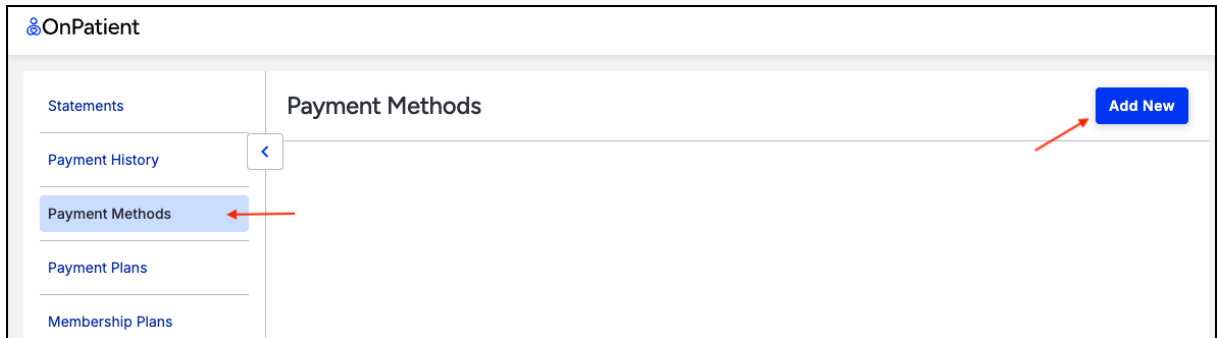
Add a payment method

1. Do one of the following:

- Select **Billing > Payment Methods**.

- Select **Go to Billing** on the **Recent Bill** tile on the **Dashboard** and then select **Payment Methods**.

2. Select **Add New** to open the **Add New Payment Method** drawer.



3. Enter the cardholder and credit card information.

4. **(Optional)** Select the **Set as my default payment method** checkbox to make this credit card your default.

5. Select **Add New**.

A screenshot of the 'Add New Payment Method' drawer. The drawer has a title bar with a close button (X). The form contains several input fields: 'Cardholder Name' (required), 'Credit Card' (required), 'Expiration' (required), 'Security Code' (required), 'Zip/Postal Code' (required), a checkbox for 'Set as my default payment method', and 'Card Nickname'. At the bottom right, there are two buttons: 'Cancel' and 'Add New'.