Enabling & Setting Up the New OnPatient

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A new version of OnPatient, your patients' portal, is now available, and you can self-enable it for your practice. This article walks you through every step: planning your settings with the OnPatient Setup Advisor, turning on the new OnPatient, and configuring your practice, provider, and intake form settings.

> **Note:** The current version of OnPatient will be retired in **March 2027**.
>
> We encourage practices to transition to the new OnPatient ahead of this date to ensure a smooth experience for both staff and patients.

In This Article

- Before You Begin
- Step 1: Open the OnPatient Tab
- Step 2: Create Your Setup Guide with the Setup Advisor
- Step 3: Turn On the New OnPatient
- Step 4: Configure Practice-Level Settings
- Step 5: Configure Provider-Level Settings
- Step 6: Review Your OnPatient Intake Forms
- Frequently Asked Questions
- Need Help?

Before You Begin

To change your practice's OnPatient settings, your DrChrono user needs all three of these permissions:

- **Settings**
- **OnPatient Settings**
- **OnPatient Practice Settings**

You do not need these permissions to use the Setup Advisor, but you will need them when you are ready to apply your settings. If you do not have them, ask the person who manages user access for your practice.

Plan for about **5 to 8 minutes** to complete the Setup Advisor and about **15 to 20 minutes** to apply the core settings in DrChrono.

Back to top

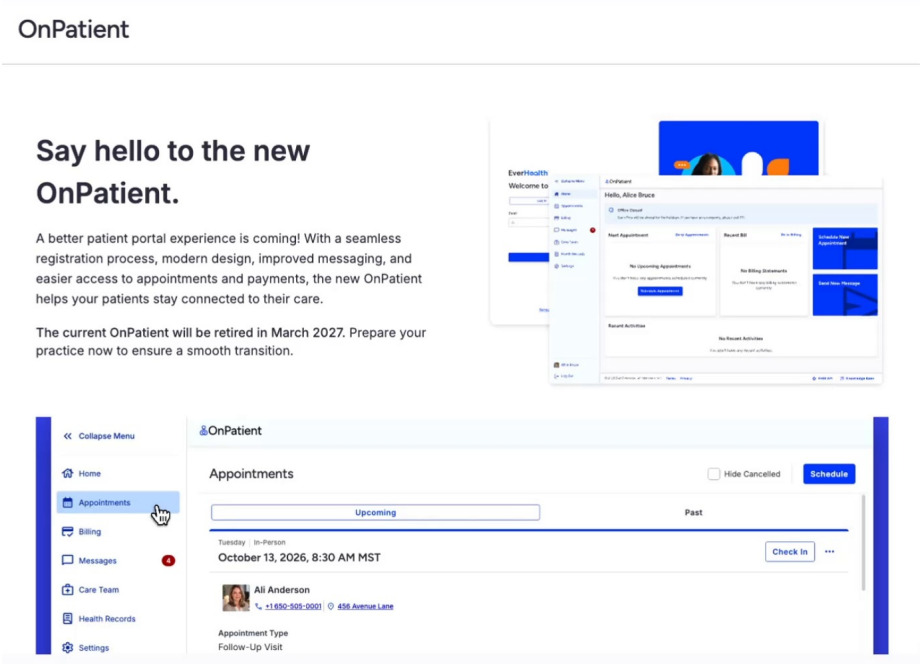
Step 1: Open the OnPatient Tab

1. In DrChrono, hover over **Account** and select **Practice Management**.
2. Select the **OnPatient** tab on the left.

You will see the **Say hello to the new OnPatient** page. From here you can:

- Watch a short video introducing the new OnPatient.
- Launch the OnPatient Setup Advisor.

- Open the **Getting Started & Configuring Your Account** and **Patient-Facing Resources** articles.
- Turn on the new OnPatient when you are ready.



Back to top

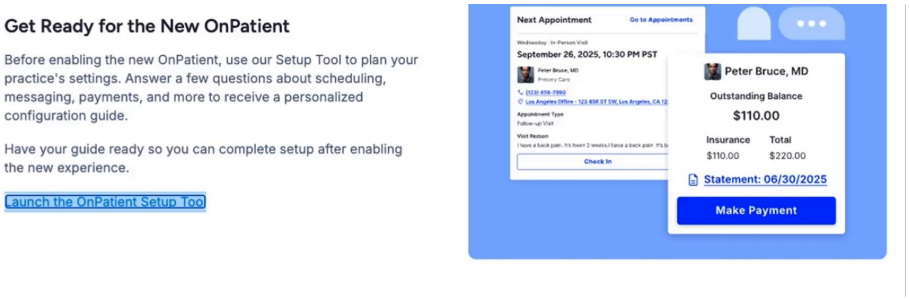
Step 2: Create Your Setup Guide with the Setup Advisor

The OnPatient Setup Advisor asks a few questions about how your practice works and then creates a personalized setup guide that tells you exactly which settings to turn on and what values to use.

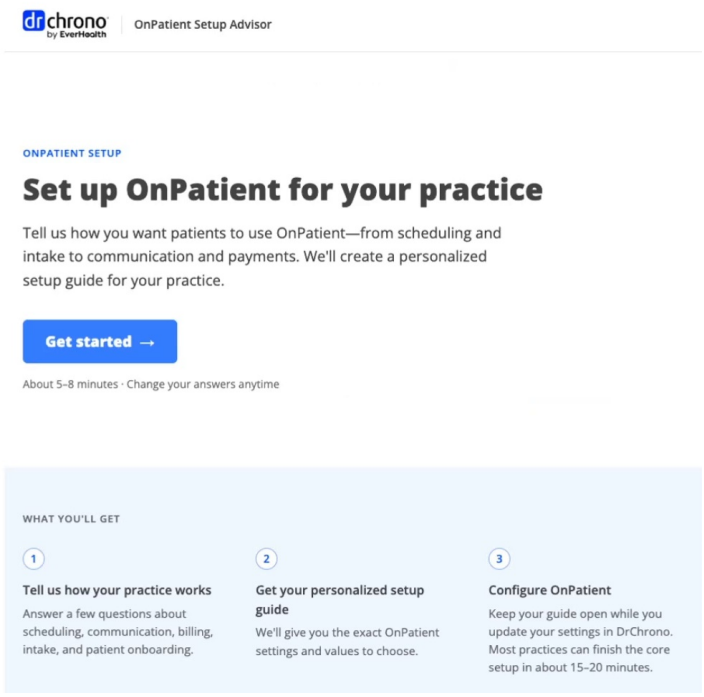
> **Tip:** Complete the Setup Advisor before you turn on the new OnPatient. That way your guide is ready and you can configure everything right after enabling.

Answer the questions

1. On the OnPatient tab, under **Get Ready for the New OnPatient**, select **Launch the OnPatient Setup Tool**.



2. Click **Get started**.

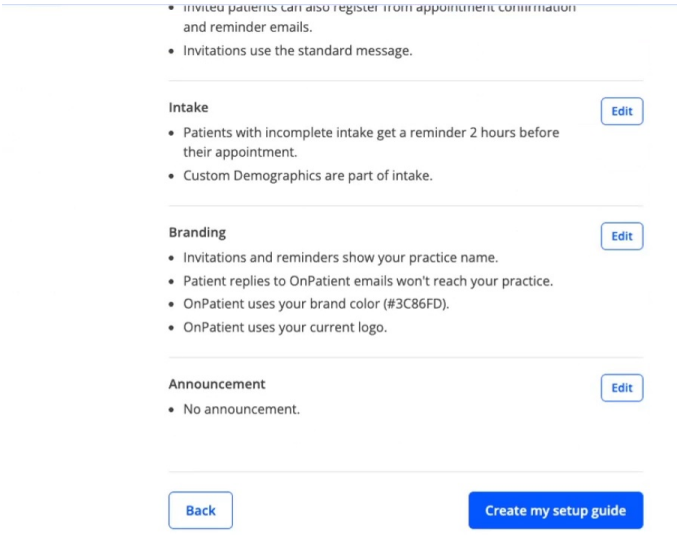


3. Work through each section, selecting **Continue** to move forward or **Back** to return to a previous section.

Some answers are marked **Recommended**. These are the choices we suggest for most practices, but there are no right or wrong answers. Choose the options that match how you want your patients to use OnPatient.

Review your answers

When you finish the questions, the **Review your OnPatient setup** page summarizes what your patients will experience. Select **Edit** next to any section to change your answers.

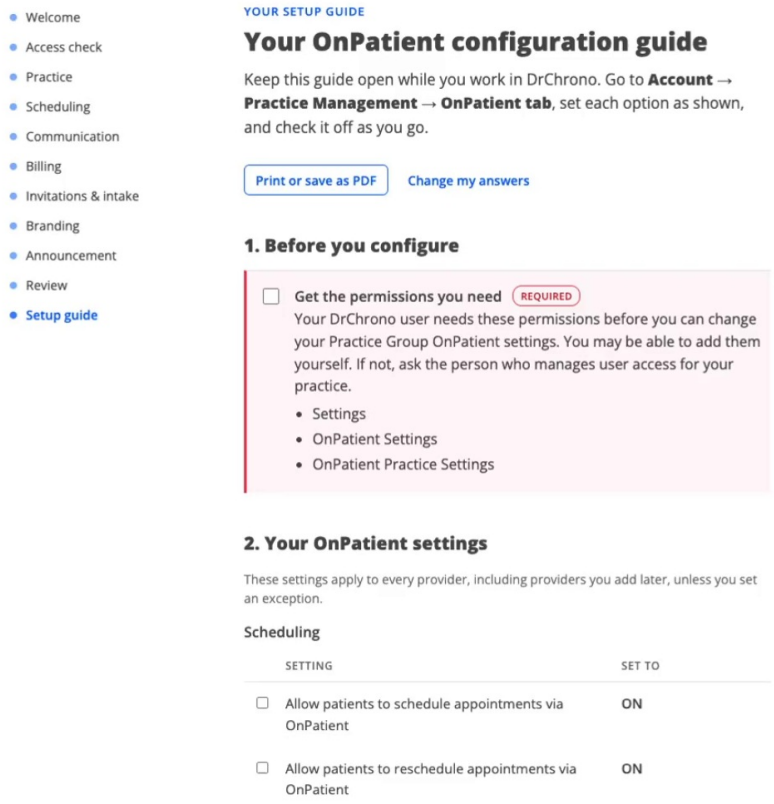


Create and save your setup guide

1. Click **Create my setup guide**.

2. Review **Before you configure**. Depending on your answers, there may be items to complete before or alongside setup, such as getting the required permissions.

3. Use **Your OnPatient settings** as your checklist. Each row lists a setting and the value to set it to.



If you keep the guide open in your browser, you can check off each item as you complete it. You can also select**Print or save as PDF**, or **Change my answers** to go back and edit.

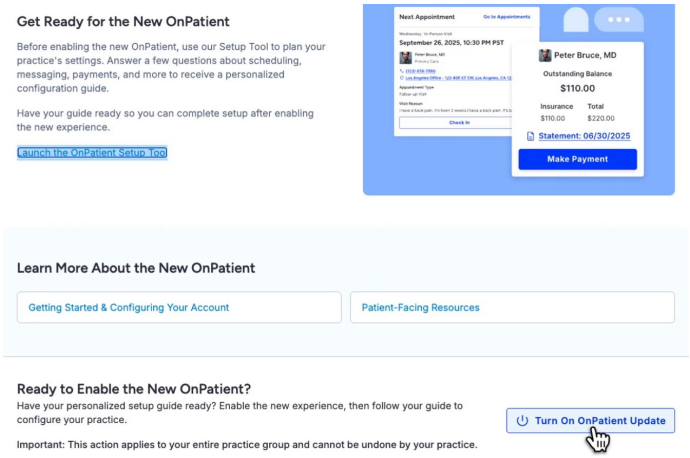
> **Tip:** We recommend saving your guide as a PDF so you have it for reference. If you ever need help, send the PDF along with your question to our Support team so they can see exactly how you want OnPatient set up.

Back to top

Step 3: Turn On the New OnPatient

> **Important:** Turning on the new OnPatient applies to your **entire practice group** and **cannot be undone** by your practice. Make sure your setup guide is ready before you continue.

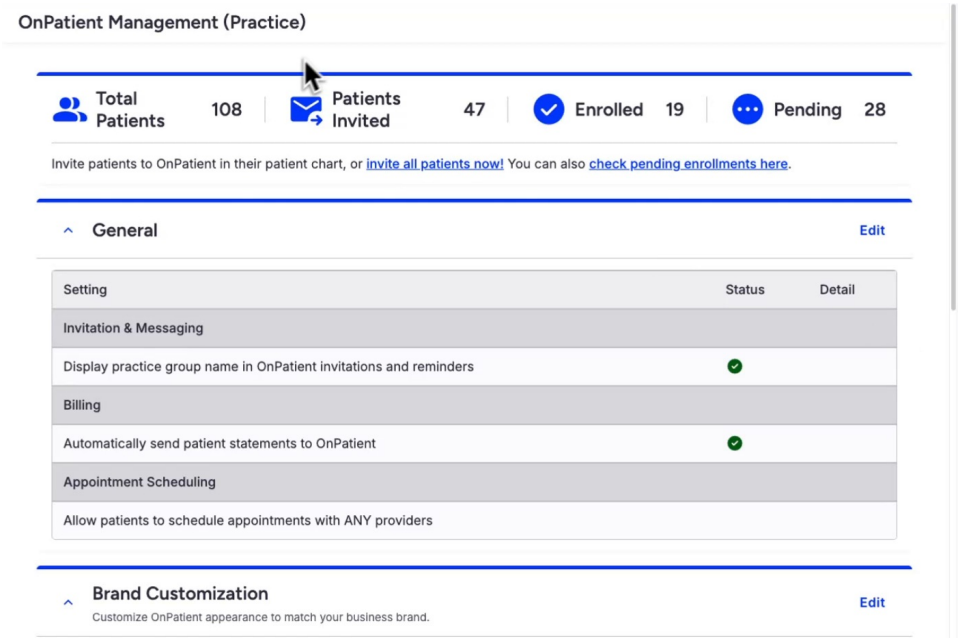
1. Go to **Account > Practice Management > OnPatient**.
2. Scroll to **Ready to Enable the New OnPatient?** and select **Turn On OnPatient Update**.
3. Confirm that you want to move to the new version of OnPatient.



Back to top

Step 4: Configure Practice-Level Settings

Once the new OnPatient is eenabled, the **OnPatient** tab in **Account > Practice Management** becomes the **OnPatient Management (Practice)** page. Settings here apply to your whole practice group. Each area has its own **Edit** button that opens a settings panel. Follow your setup guide as you work through them, then select**Save Changes**.



General

- **Display practice group name in OnPatient invitations and reminders.** When this is off, the provider's name is shown instead.
- **Automatically send patient statements to OnPatient.**
- **Allow patients to schedule appointments with ANY providers.** This requires the Share patients permission.

Brand Customization

Select **Edit** to set a custom **Header Color** and upload a **Business Logo** so OnPatient matches your practice's brand.

Announcement

Announcements show patients a message when they log in to OnPatient. Only one announcement can be active at a time. Use them for temporary notices, such as a holiday closure, or for ongoing guidance, such as directing patients with a medical emergency to call 911 or go to the nearest emergency room.

1. In the **Announcement** section, select **Edit**.
2. Turn on **Enable OnPatient announcement**.
3. Enter an optional **Title** and a **Description** (required).
4. Set the **Expiration Date**: leave it blank to keep the message up indefinitely, or enter a date and the message is removed automatically once that date is reached.
5. Select **Save**.



Back to top

Step 5: Configure Provider-Level Settings

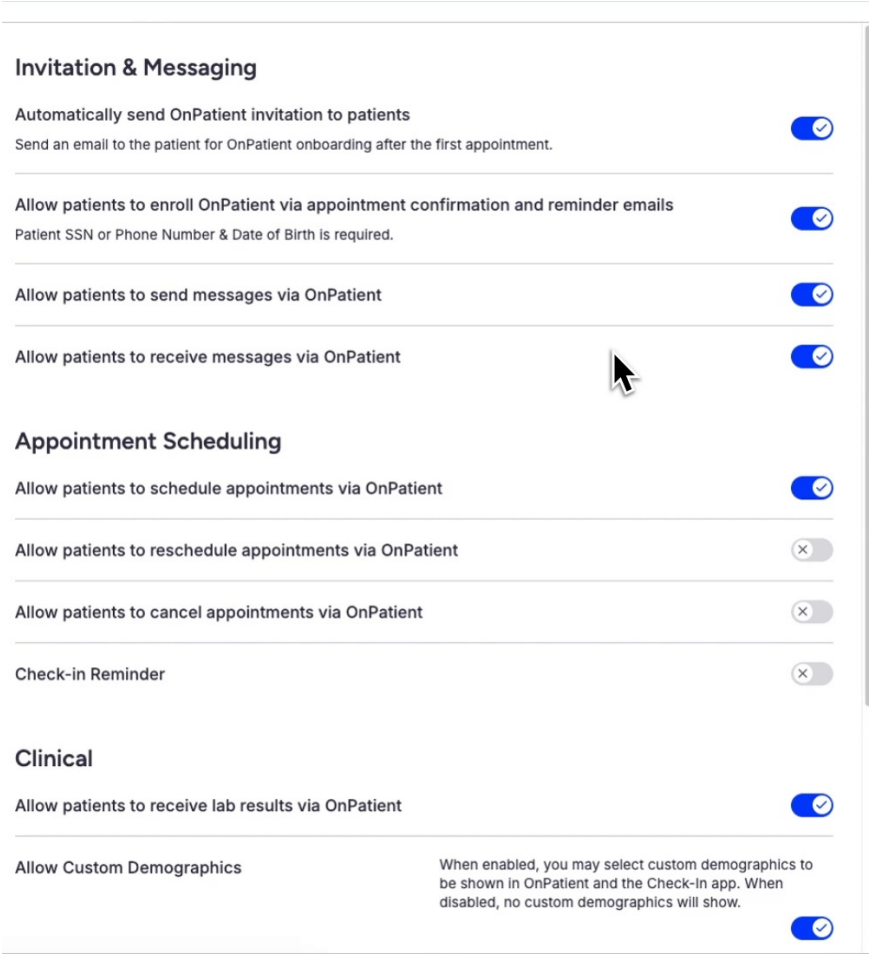
The remaining settings are set for each provider.

1. Confirm the provider selected in the practice group drop-down. The settings you change apply to that provider.
2. Hover over **Account** and select **OnPatient Settings**.
3. In the **General** section, select **Edit**.
4. Set each option to match your setup guide, then select **Save Changes**.

Provider-level settings include:

Area	Settings
Invitation & Messaging	Automatically send OnPatient invitation to patients; Allow patients to enroll via appointment confirmation and reminder emails; Allow patients to send and receive messages.

Area	Settings
Appointment Scheduling	Allow patients to schedule, reschedule, and cancel appointments; Check-in Reminder.
Clinical	Allow patients to receive lab results; Allow Custom Demographics.
Billing	Allow OnPatient payments; Minimum Payment; Allow OnPatient refunds; Automatically send patient statements (managed at the practice group level).



Note: Have several providers? An option to copy one provider's settings to all other providers is coming with the December release, so you can set them once and apply them to everyone. Until then, repeat these steps for each provider.

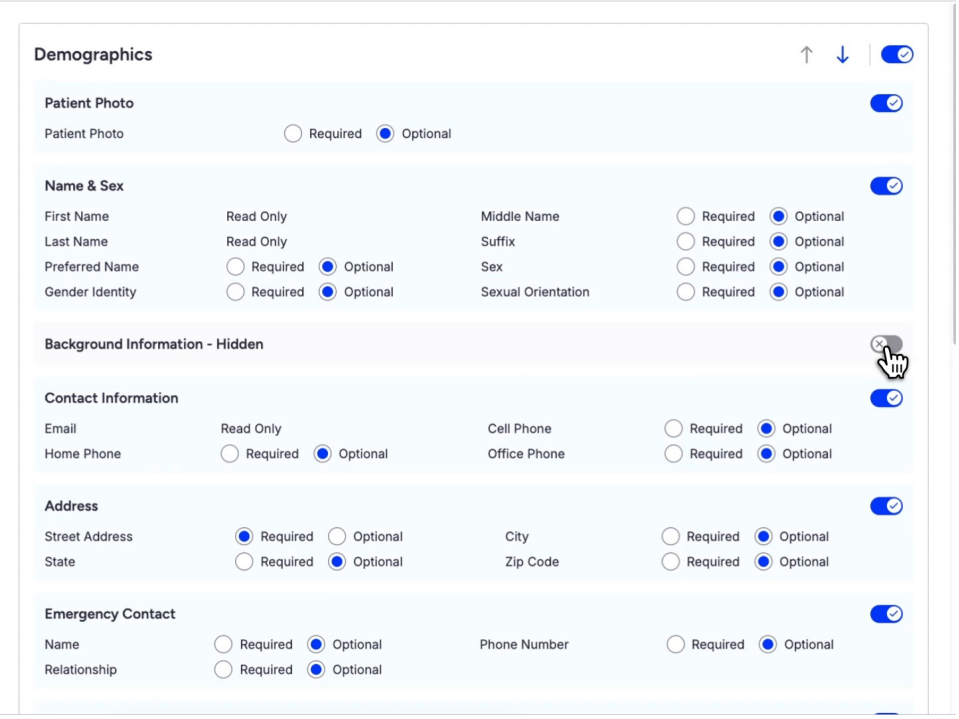
Back to top

Step 6: Review Your OnPatient Intake Forms

Your intake selections are carried over from the current OnPatient, but you should review them to make sure they are set up the way you want. The **OnPatient Intake Forms** page controls which intake sections patients see, and which fields are required or optional. These settings also apply to the **Check-In app**.

1. Hover over **Clinical** and select **OnPatient Intake Forms**.
2. Select **Edit**.

3. To hide a section, turn its switch off. The section name will be followed by **Hidden**.
4. Within each section, choose **Required** or **Optional** for each field.
5. Use the up and down arrows to change the order of sections.
6. Select **Save Changes**.



To edit the content of certain sections, select**Edit** next to the section name:

- **Additional Information** and **Visit Reasons** open the Form Builder, where you can edit your custom forms.
- **Consent Forms** opens the consent form management screen.

Back to top

Frequently Asked Questions

Can I switch back to the current OnPatient after turning on the new version?

No. Turning on the new OnPatient applies to your whole practice group and cannot be undone by your practice.

Do I have to use the Setup Advisor?

It is not required, but we strongly recommend it. The Advisor gives you an exact list of settings and values, which makes setup faster and helps avoid surprises for your patients.

Can I change my Setup Advisor answers later?

Yes. Select Edit on the review page or Change my answers on your setup guide at any time, then create an updated guide.

Will my intake form choices carry over?

Yes, your selections from the current OnPatient carry over. Review them in Clinical > OnPatient Intake Forms to confirm they are set the way you want.

When will the current OnPatient be retired?

March 2027.

Back to top

Need Help?

Our Support team is happy to help. When you reach out, attach the PDF of your setup guide along with your question so the team can see how you want OnPatient configured.

Back to top