OnPatient v2: Frequently Asked Questions

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These are the questions practices ask most often about the new version of OnPatient. Select a topic below to jump to it.

> **Note:** Ready to turn on the new OnPatient? Start with **Enabling and Setting Up the New OnPatient** for step-by-step setup instructions.

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About the New OnPatient

What is the new OnPatient?

The new OnPatient is a completely rebuilt version of your patient portal, not an update to the old one. It was built to make registration and sign-in reliable, and it adds features such as threaded messaging, check-in reminders, login announcements, and practice branding.

Does the new OnPatient cost extra?

No. OnPatient is included at no additional cost.

When will the current OnPatient be retired?

The current version of OnPatient will be retired in **March 2027**. Before then, patients using the current version will see a message encouraging them to move to the new one. After it is retired, patients are redirected to the new OnPatient automatically.

How do I turn on the new OnPatient?

Go to **Account > Practice Management > OnPatient** and select **Turn On OnPatient Update**. We recommend using the OnPatient Setup Advisor first to create your personalized setup guide. See **Enabling and Setting Up the New OnPatient** for full steps.

Can we switch back to the current OnPatient after turning on the new one?

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

Who in our practice can turn it on and change settings?

Any user with all three of these permissions: **Settings**, **OnPatient Settings**, and **OnPatient Practice Settings**. If you need them, ask the person who manages user access for your practice.

Will turning on the new OnPatient send anything to our patients?

No. Turning it on does not send messages or invitations by itself. From that point on, any new invitations you send go to the new OnPatient, and every setting can be changed at any time.

Does anything else change when we turn it on?

No. Turning on the new OnPatient changes only OnPatient.

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Existing Patients and Moving Over

Do patients who already use OnPatient need to sign up again?

No. Patients keep their existing email and password and can sign in to the new OnPatient right away. Their information stays in sync with DrChrono whether they use the old or new version.

Will our existing patients be told about the new version?

Not automatically until closer to the retirement date. If you would like to let them know sooner, you can email everyone who is already connected to OnPatient:

1. Go to **Reports > Advanced Report** and select the **Patients** tab.
2. Under **Patient Filters**, check **OnPatient connected** and select **Update Filter**.
3. Select **Create Patient Group**, give it a name, and save it.
4. Go to **Patients > Send Email**, choose your new patient group, and send your message.

Does the new OnPatient use a different web address?

Yes. If your website links to OnPatient, or you have your own patient instructions for the current version, update them to point patients to the new OnPatient at my.onpatient.com

Will the current OnPatient mobile app keep working?

Yes. The current iPhone app keeps working until sunset in March 2027. Patients can use the new OnPatient in any web browser, including on their phone, or use the new iOS and Android patient apps once available.

An enhancement for this is planned. See Upcoming Enhancements.

A patient is having trouble registering, signing in, or seeing their paperwork. What should we do?

In most cases, revoking the patient's invitation and sending a new one fixes the problem. The new invitation goes to the new OnPatient.

1. Open the patient's chart and select their OnPatient status in the chart header. You can also use the **OnPatient access** section of the chart.
2. Select **Revoke access**.
3. Send the invitation again.

If a patient's portal looks blank, also check that they are linked to your practice and have an upcoming appointment.

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Invitations and Registration

Does the way staff invite patients change?

No. Staff invite patients the same way as before: from the appointment window, the chart header, or the **OnPatient access** section of the chart.

Can patients be invited automatically?

Yes. In each provider's OnPatient settings, you can automatically send an invitation after a patient's first appointment. We recommend inviting new patients when you book them and keeping the automatic invitation on to catch anyone who was missed.

An enhancement for this is planned. See Upcoming Enhancements.

What does a patient need to register?

An invitation from your practice. During registration, the patient's information (such as date of birth and phone number) must match what is in their chart exactly. Passwords must be at least 12 characters.

What is the activation code in the invitation?

Every invitation includes both a **Sign up now** link and an activation code. The code is a backup if the link does not work. Patients can also use it to connect an existing OnPatient account to your practice by going to **Care Team** and selecting **Link Provider**.

What if a patient does not have email or a computer?

Choose **Invite via letter** to create a printable letter with sign-up instructions and an activation code. A family member or caregiver can help the patient register, and patients can sign up on any web browser.

How long does an invitation last?

Invitations are valid for 7 days. If a patient opens an expired invitation, a new one is sent automatically.

Whose name appears on invitations and reminders?

Your choice. In **Account > Practice Management > OnPatient**, edit the **General** section and turn on **Display practice group name in OnPatient invitations and reminders**. When it is off, the provider's name is shown.

Can patients reply to invitation emails?

By default, invitations come from a no-reply address. To receive replies, enter an email address in the **Brand Customization** section. Only do this if someone will monitor that inbox.

Can we customize the invitation message?

Yes. In **Brand Customization**, you can add your own message, which appears above the standard invitation text. The part with the activation code and the **Sign up now** button cannot be changed. One message is used for your whole practice.

What does "Invite and opt out" mean?

It sends the patient one OnPatient invitation, then stops automatic invitations for their future appointments. The patient can still sign up and use OnPatient as usual. Their status shows Opted Out, and staff can click it to invite them again at any time.

Can OnPatient remind patients to finish registering?

Yes. Turn on the registration reminder in each provider's OnPatient settings to nudge patients who were invited but have not signed up yet.

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Family Members, Caregivers, and Multiple Practices

Can a family member or caregiver access a patient's account?

Yes, through representative access. The patient signs in, goes to **Representatives**, and invites the family member or caregiver with full or limited permissions. The representative can then switch between accounts, and messages show that they were sent on the patient's behalf. Each person needs their own email address.

For privacy reasons, the patient (or the parent of a minor) sets this up. Your staff cannot add representatives for them.

Can a patient use one OnPatient account with more than one practice?

Yes, as long as each practice uses DrChrono. The patient selects **Care Team > Link Provider** and enters the activation code from the other practice's invitation.

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Practice and Provider Settings

Where are the OnPatient settings?

- Practice-wide settings (General, Brand Customization, Announcement): **Account > Practice Management > OnPatient**.
- Provider settings (invitations, messaging, scheduling, check-in, lab results, billing):**Account > OnPatient Settings**.
- Intake fields: **Clinical > OnPatient Intake Forms**.

If a settings page does not load correctly the first time you open it, refresh your browser.

Do we have to set up every provider separately?

For now, yes. Select each provider from the drop-down at the top of **Account > OnPatient Settings** and set their options.

An enhancement for this is planned. See Upcoming Enhancements.

Which providers need OnPatient settings?

Any provider who can be a patient's primary provider, including fill-in providers. Former providers do not need to be set up.

Can we change our settings later?

Yes. You can change any setting at any time. Keep your setup guide from the OnPatient Setup Advisor handy so you know what you chose.

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Scheduling

Can patients book, reschedule, or cancel appointments?

Yes, if you allow it. Booking, rescheduling, and cancelling are separate settings, so you can allow one and not the others.

Can we stop patients from cancelling close to the appointment?

Yes. Set the number of hours before the appointment when patients can no longer cancel or reschedule. Inside that

window, the option is grayed out for the patient.

What happens when a patient cancels?

The appointment stays on your calendar with a **Canceled** status, and the time slot opens up again. Patient scheduling activity appears in the Message Center.

Which appointment types can patients book?

Only the appointment profiles that you have marked for online booking.

Can we turn on patient scheduling for only some patients?

No. Each scheduling setting is on or off for all of a provider's patients.

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Messaging

What is the difference between two-way and one-way messaging?

With two-way messaging, your practice and your patients can message each other. With one-way messaging, your practice can send messages but patients cannot reply. One-way messaging is useful if you only want to send information, or if patients contact you another way.

Can patients and staff send attachments?

Yes. Up to 15 files can be attached to one message, so patients get a single notification instead of many.

Can staff message patients, or only providers?

Staff can message patients. Messages are sent on behalf of the provider.

What is an internal note?

An internal note is visible only to your staff, never to the patient. To answer a patient, use the reply box, not the internal note box.

Can we message a patient who is not on OnPatient?

No. To message a patient securely, they must be connected to OnPatient. You can invite them first and message them once they sign up.

Can providers set an out-of-office message?

Not currently.

An enhancement for this is planned. See Upcoming Enhancements.

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Intake, Check-In, and Consent Forms

What is the check-in reminder?

A set number of hours before an appointment, OnPatient checks whether the patient has finished their check-in, including intake forms and required consent forms. If not, it sends one email and one text reminder. Patients who are already done do not receive it. The default is 2 hours, and you can choose any number of hours. The reminder wording cannot be customized.

What does CIO on the calendar mean?

CIO means **checked in online**: the patient is registered, linked to your practice, and has completed their check-in.

How do we choose which intake fields are required?

Go to **Clinical > OnPatient Intake Forms** and select **Edit**. Turn a section's switch off to hide it, and choose **Required** or **Optional** for each field. Fields marked **Read Only** are shown to the patient but cannot be changed by them, such as name, date of birth, and email.

Can intake forms be different for each provider?

No. Intake form settings apply to your whole practice group. They also apply to the DrChrono Check-In app.

Can patients complete intake without an appointment or an OnPatient account?

Not currently. Intake is always tied to an upcoming appointment, and patients complete it through OnPatient.

An enhancement for this is planned. See Upcoming Enhancements.

Can patients change their medications, allergies, or problem list?

Patients can view these lists, but they cannot edit them. During intake, they can add notes about changes, which your staff can review.

How do we make sure patients sign our consent forms?

1. Go to **Patients > Consent Forms** and make sure the forms you need are marked mandatory.
2. Go to **Account > Custom Fields > Appointment Profiles**, select **Edit** on each profile, and attach the consent forms that profile needs.

Forms marked as default are only added to appointment profiles created afterward, so check your existing profiles too. Consent forms are signature-only. Patients cannot type answers or check boxes on them.

Can patients upload their insurance card or ID?

Patients can upload photos of their insurance card during intake, but you cannot currently make it required. There is no dedicated ID upload today. Patients can attach an ID photo to a message (if two-way messaging is on), and staff can save it to the chart with a document tag.

An enhancement for this is planned. See Upcoming Enhancements.

Can a form's answers carry over to future visits?

Yes. In the form builder, select the gear icon and choose **Make form persistent**. Answers carry forward to future visits.

Can OnPatient score screening questionnaires like the PHQ-9?

No. OnPatient collects the answers but does not score them.

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Lab Results and Documents

Can lab results be sent to patients automatically?

Yes. When the lab results setting is on, results from labs ordered through DrChrono's lab integrations are posted to OnPatient automatically along with the requisition, and the patient is notified. The setting applies to all results, so if some of your results are sensitive, you may prefer to leave it off and share results manually.

How do we share a document, visit note, or outside result?

Open the patient's chart, go to **Documents**, and select the OnPatient icon on the document. You can share up to 15 documents at once and add a message. Locked clinical notes are shared as the full PDF. Only lab results are sent automatically if you have the setting enabled.

Can patients upload their own lab results?

Patients can attach lab reports to a message. Staff can then save the report to the chart as a document with a lab tag.

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Statements and Payments

Can statements be sent to OnPatient?

Yes. You can send statements to OnPatient automatically whenever they are generated. Patients receive an email notification and can see their current and past statements and payment receipts. Each time a statement is sent, the patient is notified, so if you generate statements more than once, you may prefer to turn off automatic sending..

Can patients pay through OnPatient?

Yes, if your practice uses DrChrono Payments. Patients can pay with a card and save more than one card. We

recommend a minimum payment (for example, $5) so small payments do not cost more in processing fees than they bring in. Payment by bank account (ACH) is not currently available. If you use a different card processor, patients can view statements but cannot pay through OnPatient.

An enhancement for this is planned. See Upcoming Enhancements.

Can we send a superbill to a patient's OnPatient account?

Yes. Use **Send to OnPatient** from the appointment window.

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Branding and Announcements

Can OnPatient match our practice's branding?

Yes. In **Account > Practice Management > OnPatient**, edit **Brand Customization** to choose a header color (with the color picker or a hex code) and show your business logo.

Which logo does OnPatient use?

OnPatient uses the same logo as the rest of your DrChrono account, so changing it also changes the logo on documents like clinical notes.

An enhancement for this is planned. See Upcoming Enhancements.

How do announcements work?

- An announcement is a banner patients see on their OnPatient home page after signing in.
- Only one announcement can be active at a time, and it applies to your whole practice group.
- The description is required, and the title is optional.
- There is no length limit, so you can combine notices into one announcement.
- Add an expiration date to remove it automatically, or leave the date blank to keep it up.
- Announcements are not sent to patients as messages, and they cannot be targeted to specific patients.

Common uses include holiday closures and a permanent reminder that OnPatient is not for emergencies.

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The Patient Experience

What do patients see in the new OnPatient?

- A home page with their next appointment and check-in, recent activity, and a button to send a message.
- Health records, including problems, allergies, medications, and vital sign trends. These are view-only.
- Their messages, documents, lab results, and, if turned on, statements and payments.
- Their care team, where they can link other DrChrono providers.

Do notifications include health information?

No. Email, text, and app notifications are generic, such as "You have a new message." Patients sign in to see the details.

What is the Access Log in a patient's health records?

A record of each time the patient exported their own health records.

How do telehealth visits work with the new OnPatient?

Patients who use OnPatient sign in and select **Start Visit**, or click the link in a reminder and are first prompted to sign in. Patients who do not use OnPatient receive an email and text with a link that opens the visit in their web browser. During the visit, you can also text or email the patient the link to join.

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Upcoming Enhancements

We have heard your feedback. These enhancements to OnPatient are on the way:

Setup and settings

- Manage all providers' OnPatient settings from one place, with exceptions for individual providers.

Invitations

- Automatically invite patients when an appointment is booked.
- Invite a group of patients at once, using patient groups from Advanced Reports.
- Re-invite pending patients in bulk.
- Flag patients whose demographics are too incomplete to invite.

Intake and check-in

- Send intake forms to patients without requiring them to register for OnPatient.
- Use different intake forms for different appointment types.
- Make insurance card and ID uploads required during intake.

Messaging and documents

- Provider out-of-office messages.
- Send an after-visit summary to OnPatient in one click.

Scheduling

- Make the cancel and reschedule options easier for patients to find.
- Book telehealth-only offices as video visits automatically.

Statements and payments

- Pay by bank account (ACH).

Branding

- A separate logo just for OnPatient, and a larger logo display.

Mobile

- New iPhone and Android patient apps, with push notifications.

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Need Help?

Our Support team is happy to help. If you used the OnPatient Setup Advisor, attach the PDF of your setup guide when you reach out so the team can see how you want OnPatient configured.

Related articles: **Enabling and Setting Up the New OnPatient** and **Account Permissions Overview**.

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