

Bulk Inviting All Patients to OnPatient

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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**.

The screenshot shows the DrChrono navigation bar with 'Account' and 'Marketplace' tabs. Below it, the 'ACCOUNT SETTINGS' menu is open, listing 'User Settings', 'Provider Settings', 'onpatient Settings' (highlighted in blue), and 'Account Setup'.

To invite a patient to OnPatient, you 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:

A form field with a green checkmark icon, the label 'Social Security Number', and the placeholder text 'XXX-XX-2222'.

or

Two form fields, each with a green checkmark icon. The first is labeled 'Date of Birth' with the placeholder 'Aug. 17, 1997'. The second is labeled 'Phone Number' with the placeholder '(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.

The screenshot shows the 'onpatient Settings' page. At the top right, there is a link 'Invite patients to onpatient under their Patient > Patient Access page.' and a button 'Invite all patients now!'. Below this are three summary cards: '41 TOTAL PATIENTS' (with a person icon), '12 INVITED TO ONPATIENT' (with an envelope icon), and '4 SIGNED UP FOR ONPATIENT' (with a checkmark icon). A red arrow points to the 'Invite all patients now!' button. At the bottom, there are tabs for 'Doctor', 'Appointments', 'Communication', and 'Style'. Under the 'Doctor' tab, there are fields for 'Profile Picture' and 'Practice Business Logo', both with 'Choose File' buttons and 'No file chosen' text. To the right of these fields are notes: 'Will be attached to patient emails' and 'Will be attached to emails & official forms'. At the bottom of the settings area is a blue button labeled 'Update onpatient Settings'.

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

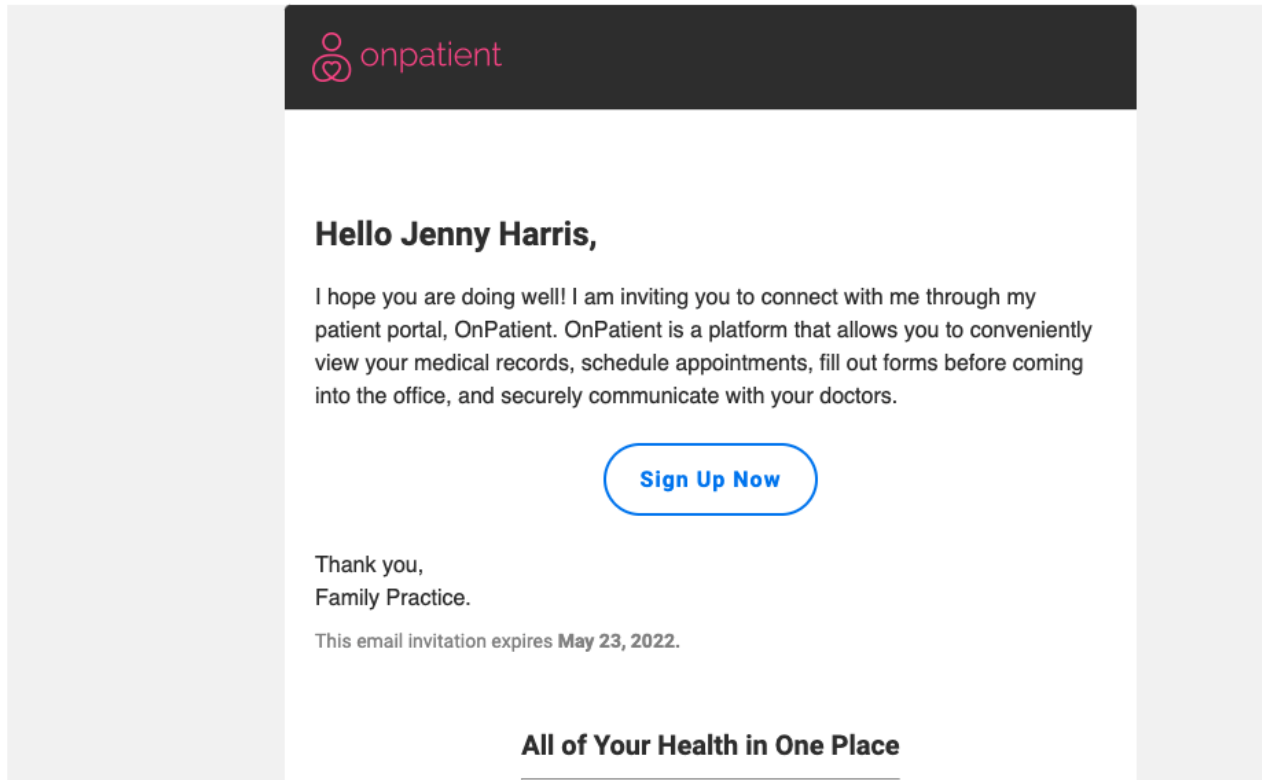
A Preview of an OnPatient Invite

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

Connect with Family Practice via onpatient Inbox x

onpatient Invite <no-reply@onpatient.com>
to me ▾

Mon, May 16, 10:09 AM (1 day ago)



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.



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Sign Up

Sign up

First name

Last name

Email address

Create Password

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Sign up