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## Patient Portal Home Screen

When a patient navigates to their portal home screen, they have two options to take action on their account:

- Make a **one-time payment**: Allows user payment access only.
- Become a **Registered User**: Allows user access to all of the functionality.

**Demo Merchant**

Home | **FAQs** | Contact | Make payment

**Welcome to Patient Portal!**

Patient Portal is a FREE self-service tool which allows you to enjoy 24/7 access to view and pay your invoices through a convenient, safe, and secure environment.

**What you can do:**

- View and pay invoices
- Set up AutoPAY and eDelivery
- See your payment history

**AutoPAY**  
Never worry about late fees! AutoPAY allows you to store your credit/debit card or bank account information safely and securely and charge the account on file on the invoice due date.

**eDelivery**  
Save paper and the trees! Sign up for eDelivery and receive email alerts when invoices are ready to be paid.

Ready to register? [Create account](#)

**Account login**

Username

Password

[Login](#)

[Forgot your password?](#)

**Don't have an account?**

[Register now](#)

[Register via code](#)

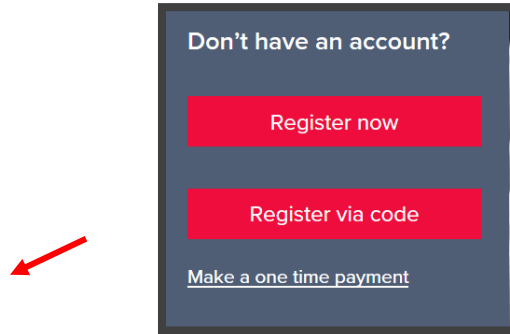
[Make a one time payment](#)

Want to see your account history?  
Not a registered user yet? [Register Now >](#)

## Making a One-Time Payment

For patients that do not wish to register an account, but simply make a one-time payment, they would take the following steps:

1. From the portal home page, click on **one-time payment**.

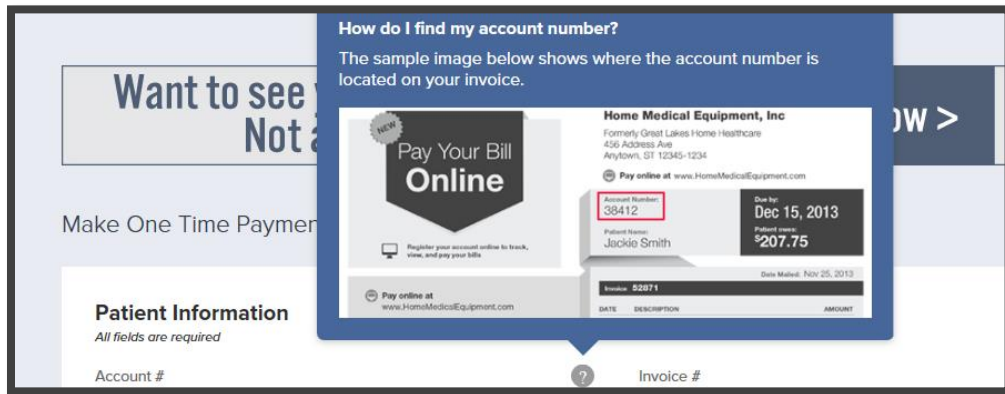


2. Enter the Account #, Invoice #, Last name, and Phone #.

**Note:** The information can be located on the invoice or statement received. These are the **REQUIRED** Fields.

The screenshot shows a form titled "Make One Time Payment". Under the heading "Patient Information", it states "All fields are required". There are six input fields arranged in two columns: "Account #" (with a red arrow and a question mark icon), "Invoice #" (with a red arrow and a question mark icon), "Last name", "Phone #", "Email (Optional)", and "Confirm email address". A "Next" button is located at the bottom right of the form.

**Note:** Hovering over the question mark icon will instruct where these identifiers can be located on an invoice.



3. Select the red Next icon.

**Note:** The next icon will appear in grey if required information is missing. The user cannot proceed until the information is entered.

Make One Time Payment

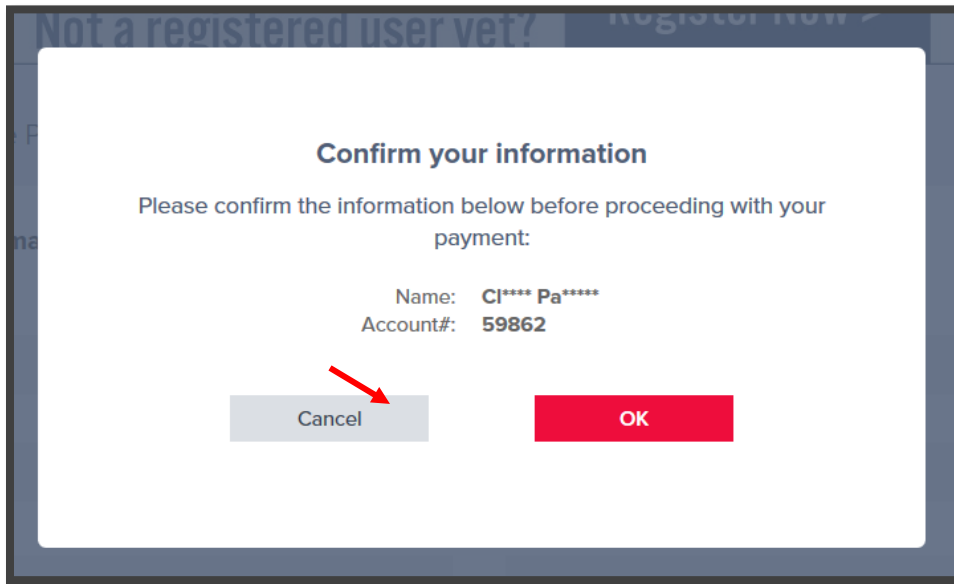
**Patient Information**  
*All fields are required*

Account #  Invoice #

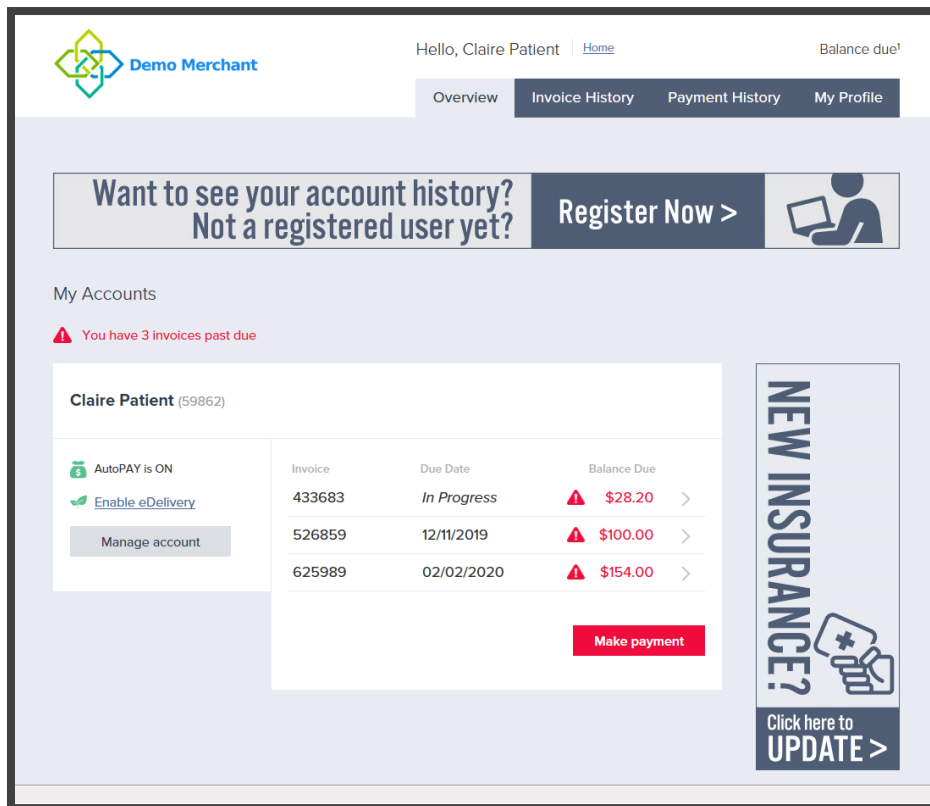
Last name  Phone #

Email (Optional)  Confirm email address

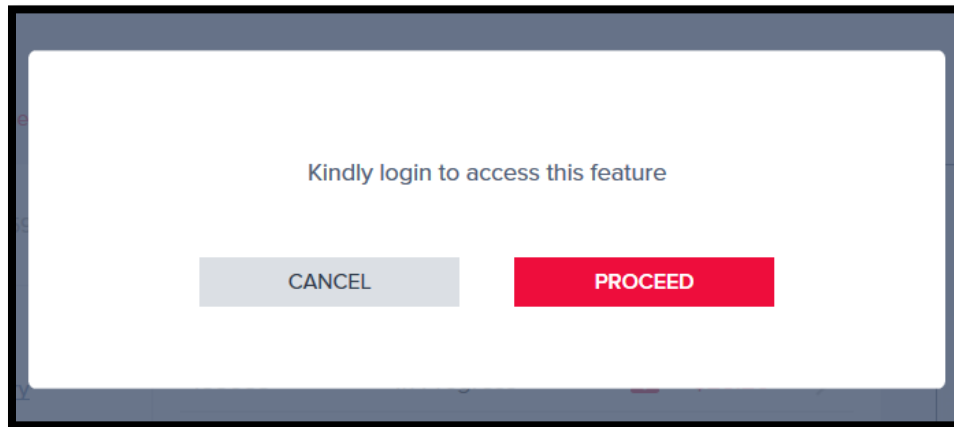
4. Confirm information and select ok.



5. Invoices with a balance due will display in the Overview page.
6. When making a one-time payment, the **Make Payment** action is the only available option.



**Note:** Selecting anything except Make Payment will result in the below message. Selecting CANCEL will navigate back to the Overview Screen. Selecting PROCEED will navigate the patient back to the Patient Portal Login Page to access the Register Account option.



7. After selecting Make Payment, the payment screen will appear.

8. Select the invoices to be paid and payment method (check or credit card).
9. Enter the billing information for the payment method.

Payment

**Claire Patient**  
59862

**Step 1 - Open invoice(s)**

Select	Invoice	Due date	Balance due
<input checked="" type="checkbox"/>	.. 433683	12/13/2019	\$28.20 *
<input type="checkbox"/>	.. 526859	12/11/2019	\$100.00
<input type="checkbox"/>	.. 625989	02/02/2020	\$154.00

**\*Payment not yet applied** Total payment  
 If you wish to make other payment [click here](#) **\$28.20**

**NEW INSURANCE?**  
Click here to **UPDATE** >

**Select**

Credit Card

Electronic Card (eCheck)

Name as it appears on credit card

Billing address

Zip Code ?

Total payment: **\$28.20**

**Next**

10. Select the red **Next** icon.  
**Note:** The next icon will appear in grey if required information is missing. The user cannot proceed until the information is entered.
11. Verify the information entered is correct. Select the red **Next** icon.

Payment

**Thomas Osborne**  
10010


⚠ Please verify that the information below is correct.

**Invoice(s)**

Invoice	Due Date	Balance Due
12415	01/29/2020	\$276.30

Total amount: **\$276.30**

**Payment information**



Name: Thomas Osborne  
Billing Address: 1233 Main Street  
Zip Code: 66106

Total amount: **\$276.30**

[Cancel](#)

Edit

Next

12. Enter the credit card information including card number, expiration date, and CVV code. Click **Submit Transaction** once all information is entered.

**Note:** For security reasons, the screen to enter card information is only available for a set amount of time. The remaining time will display in the top left corner of the form.



For security reasons this session will expire in  
**04:48**

**Enter credit card information**

⚠ After completing the form below, click the "Submit Transaction" button only once.

To complete your secure transaction, please enter credit card information and click Submit Transaction button.

*This secure payment service is provided by [Worldpay](#)*

**Address Information**

**Billing Address**  
Thomas Osborne  
1233 Main Street  
66106

**Transaction Information**

Total: \$276.30

**Card Information**

\*Card Number:

\*Expiration:

\*CVV:  [What's This?](#)

secured by **worldpay**

13. If the transaction is successful, messaging will appear along with payment information.

Payment

**Thomas Osborne**  
10010

**Thank you for making your payment!**

You will receive a receipt via email and can always access a copy in your Payment History.

Your Payment of \$276.30 will be applied to the invoice(s) below. Please allow up to 7 business days for processing.

**Paid invoice(s)**

Invoice	Due date	Original amount	Payment
12415	01/29/2020	\$276.30	\$276.30

Total payment:  
**\$276.30**

**Payment information**

Status	***Approved***
Date	Apr 17, 2020, 02:13 PM
Reference #	PO202004171508245712
Transaction ID	46081739
Credit card	Visa Credit *****1111
Name on the card	Thomas Osborne
Billing address	1233 Main Street
Billing zip code	66106
Payment made to	BPC, P.O. Box 740751 Los Angeles, CA, 90074-0670

[Save/print receipt](#)

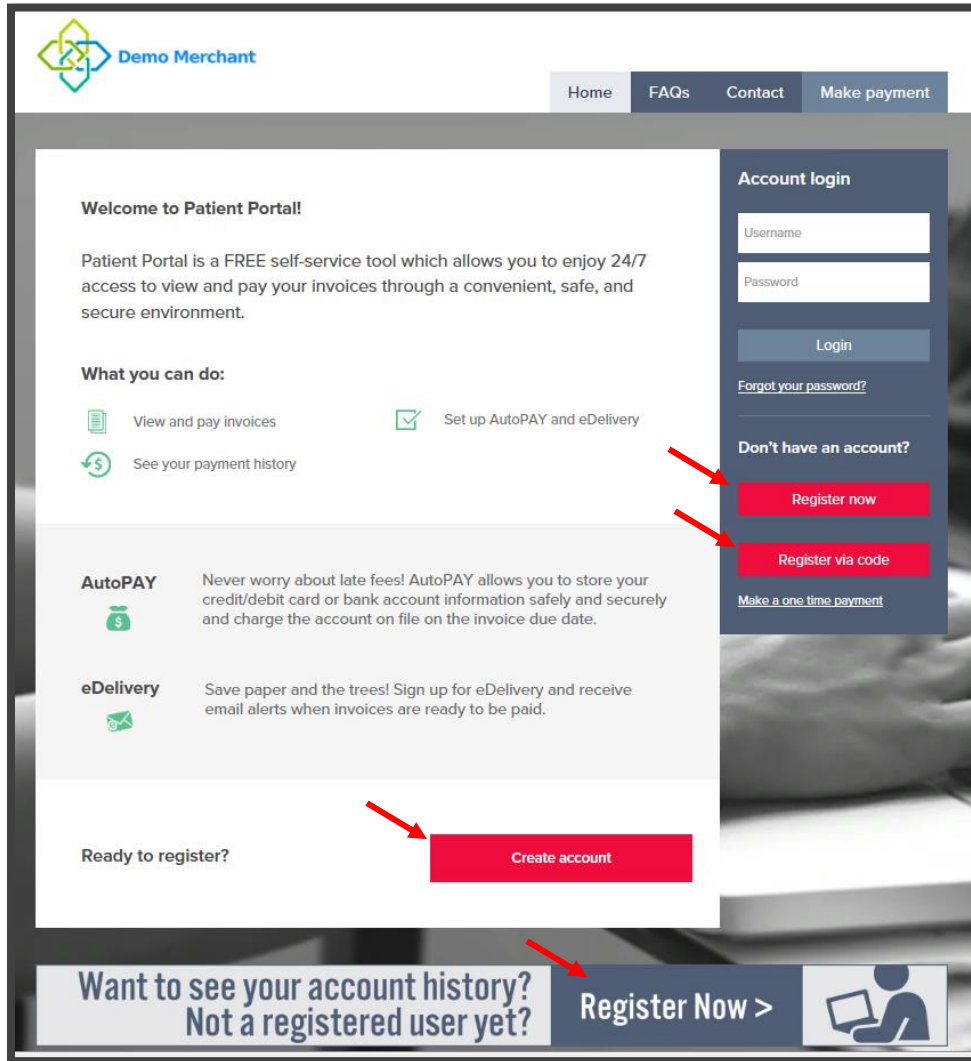
## Becoming a Registered User

As a Registered User, the patient is able to view invoices, save payment methods, make payments, view payment history as well as manage account settings such as AutoPAY and eDelivery.

There are several options present on the portal home screen to start registration:

1. Register Now

2. Register via code (if applicable/obtained from provider)
3. Create Account
4. Register Now banner



5. After selecting the registration option, enter the necessary information in the Register screen.

**Note:** All fields are required. The email populated in this area will be used as the username for the Account login.

Register

**1 Create user profile** All fields are required

First name

Last name

Email address

*You will use this email to sign in to your profile after registration*

Confirm email address

Click to continue to the registration process; an email will be sent to the email address you've provided.

Continue Registration Process

Register via code

**1 Create user profile** All fields are required

**i** Use the exact name provided while requesting the code.

First name (Optional)

Last name

Email address

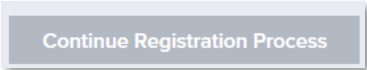
*You will use this email to sign in to your profile after registration*

Confirm email address

Code

Click to continue to the registration process; an email will be sent to the email address you've provided.

Continue Registration Process



6. Click Continue Registration Process

7. An email will be sent to the email address provided for verification purposes.

Demo Merchant

Home   FAQs   Contact   Make payment

Register

**1 Create user profile**

**2 Verification**

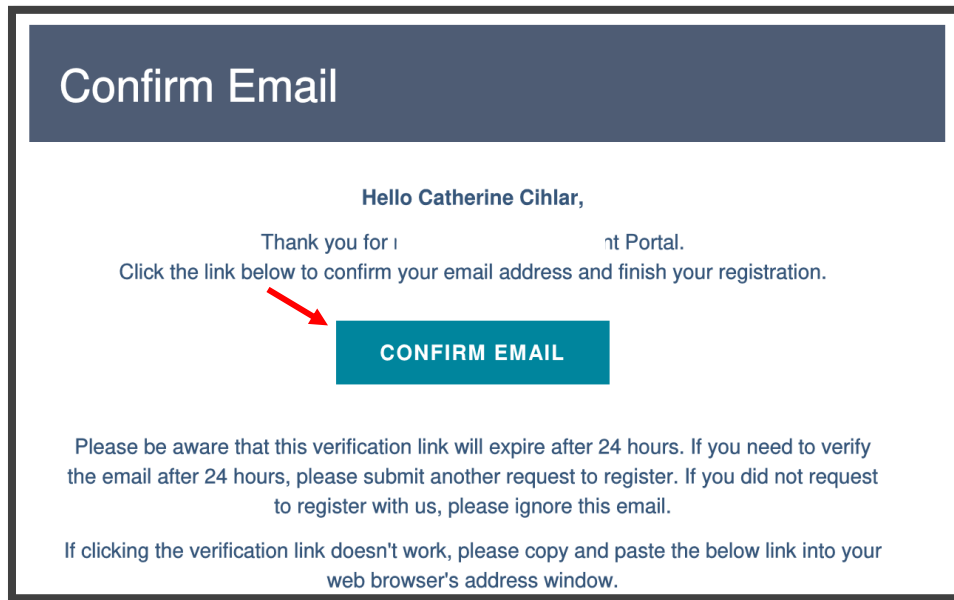
Hey ,

An email has been sent to . Open the email and click the link to validate the email address and continue the registration process.

If you do not receive a verification email, please check your spam/junk folders. If you do not receive the verification email within 24 hours, please register again. If you still do not receive the verification email, please contact our office.

8. Once the email has been received, select **CONFIRM EMAIL**.

**Note:** The confirmation email link will expire after 24 hours. The email will be sent within a few minutes after selecting Continued Registration Process. If not received, check junk or spam.



9. The patient will be directed to the portal and the Create Profile option.

Create Profile

**1** Create user profile All fields are required

First name

Last name

Email address

Phone #

Choose Password

Confirm Password

**Password criteria**

- Must be at least 8 characters long.*
- Must contain at least 1 upper-case letter.*
- Must contain at least 1 lower-case letter.*
- Must contain at least 1 number.*
- New Password and Confirm Password fields must match.*

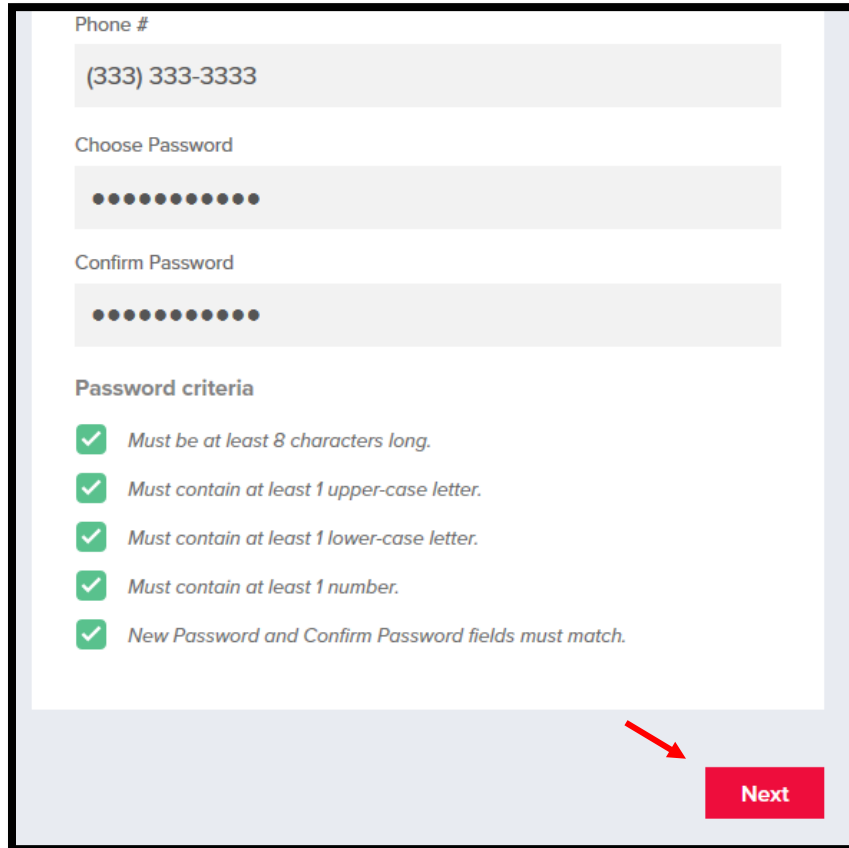
**2** Add patient account

**3** Summary

10. Enter all necessary information.

**Note:** All fields are required.

11. After all information has been entered, a green check box will appear next to each line item of the Password criteria if all criteria are met.



Phone #

(333) 333-3333

Choose Password

••••••••

Confirm Password

••••••••

Password criteria

- ✓ Must be at least 8 characters long.
- ✓ Must contain at least 1 upper-case letter.
- ✓ Must contain at least 1 lower-case letter.
- ✓ Must contain at least 1 number.
- ✓ New Password and Confirm Password fields must match.

Next

12. Select the **Next** icon.

13. From the **Add patient account** screen, enter all necessary information.

**Note:** The account and invoice number are required.

14. Once populated, select **Complete Registration**.

**Note:** This step is NOT required when using **Register via code**.

1 Create user profile

2 Add patient account

3 Summary

Thank you for creating your user profile!

**Patient # - Account information**

I am the patient (use the same last name as my user profile)

First name (Optional)

Kelly

Last name

Patient

Account # ?

15687

Invoice # ?

550128297

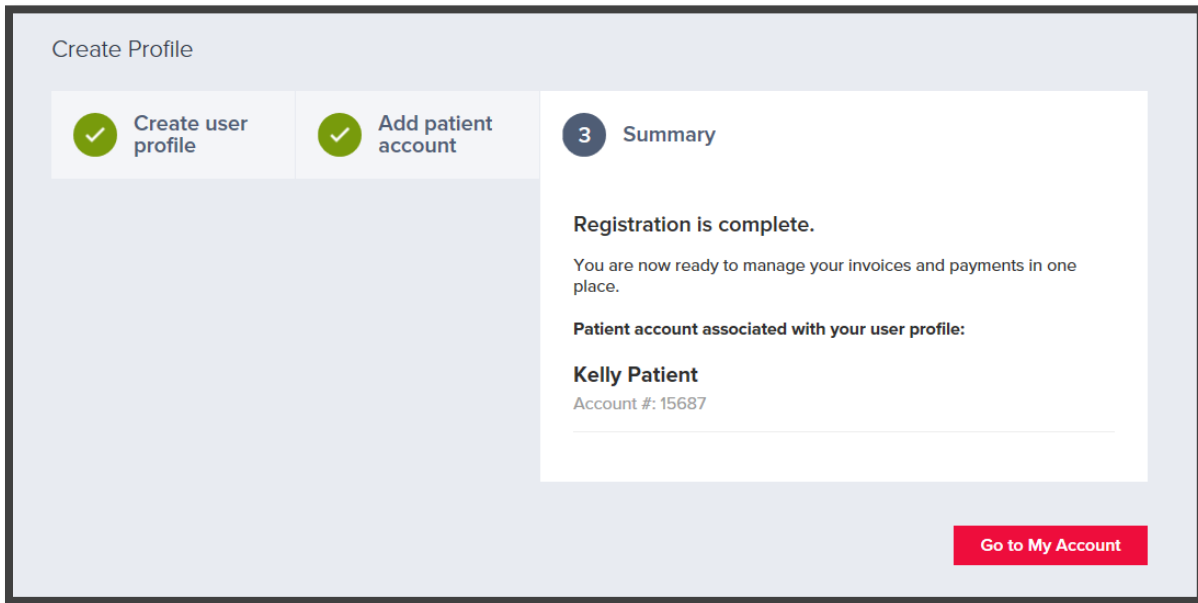
Add a family member to make a payment for medical services they received.  
Please enter the account information found on the patient invoice.

Complete Registration

15. The **Summary** screen will appear indicating registration is complete.

16. Select **Go to My Account**.





## Registered User Login

1. To log into the Patient Portal after registration, navigate to the same hmebillpay site.
2. Under Account login, enter the email used to register in the Username field and the Password entered when registering.

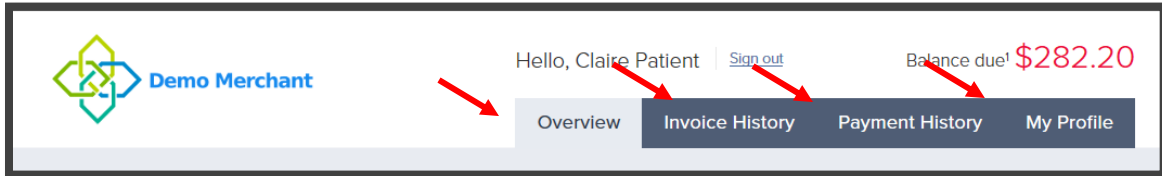
The screenshot shows a dark blue 'Account login' form. It contains two input fields: 'Username' and 'Password'. Below the fields is a blue 'Login' button.

3. The patient will be directed to their account with registered user options.

## Registered User Options

As a Registered User, the patient is able to view invoices, save payment methods, make payments, view payment history and manage account settings such as AutoPAY and eDelivery.

Upon login, the portal will default to the **Overview** tab.



On the **Overview** tab, the user will see options to:

- Make a payment
- Setup AutoPAY
- Enable eDelivery
- Manage their account
- Provide updated insurance information

Additional tabs can be selected at the top of the screen:

- Invoice History
- Payment History
- My Profile

Hello, Claire Patient | [Sign out](#) | Balance due<sup>1</sup> \$282.20

**Overview** | Invoice History | Payment History | My Profile

**Sign up for AutoPAY and eDelivery** [CLICK HERE >](#)

My Accounts

**⚠ You have 3 invoices past due**

**Claire Patient** (59862)

- [Setup AutoPAY](#)
- [Enable eDelivery](#)
- [Manage account](#)

Invoice	Due Date	Balance Due
433683	In Progress	⚠ \$28.20 >
526859	12/11/2019	⚠ \$100.00 >
625989	02/02/2020	⚠ \$154.00 >

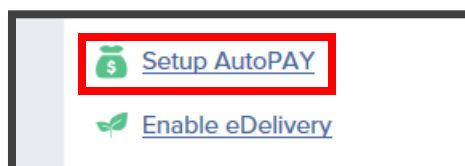
[Make payment](#)

**NEW INSURANCE?**  
Click here to **UPDATE >**

Overview tab – Setup AutoPAY

Registered users have the option to Setup AutoPAY on their account.

1. After logging into the registered account, select the **Setup AutoPAY** hyper link on the left of the Overview page.



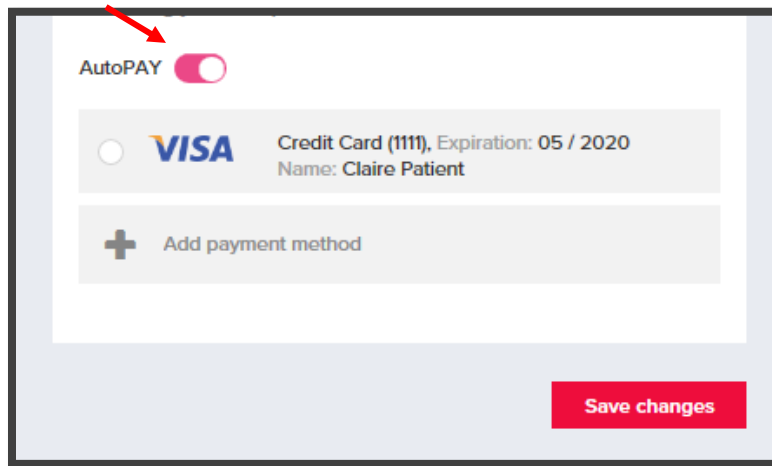
2. The user is directed to the **My Profile** tab.

3. If there is an email on the patient account in the AR Dashboard, it will be listed here. If no email is on file in the AR Dashboard, the fields will be empty and require information to be entered.

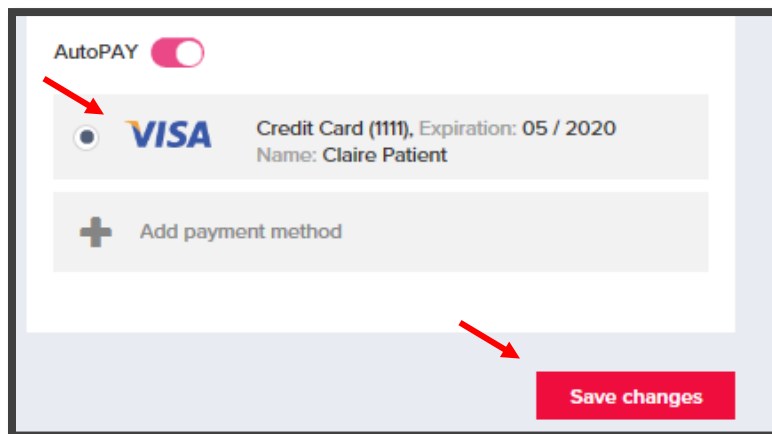
**Note:** This is NOT the user profile email. Email and phone number are required fields. This email will be the recipient of the Welcome to AutoPAY email along with all AutoPAY receipts after payment.

4. Select the AutoPAY indicator. Once selected it will turn from gray to red.

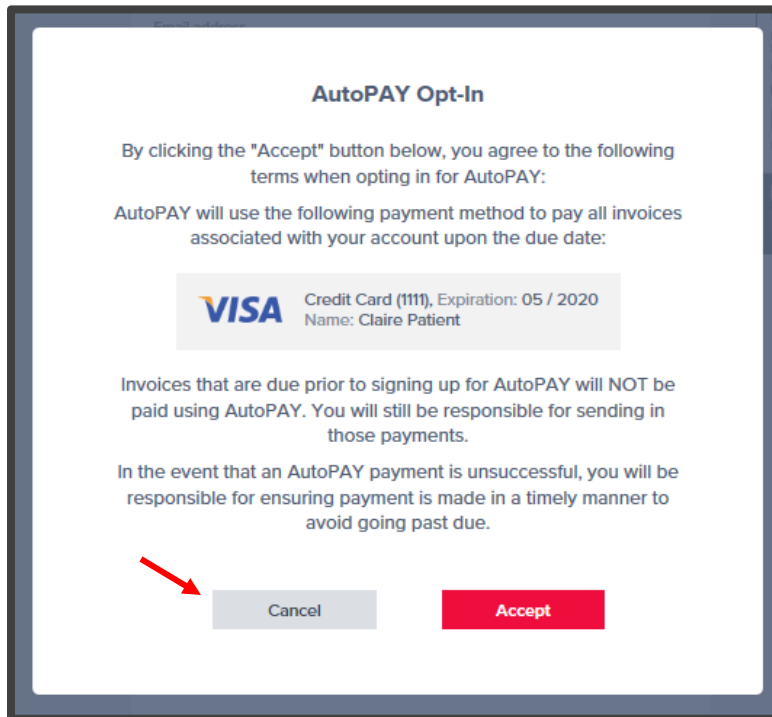
5. After any field has been updated, the Save changes option will turn from gray to red and be available for selection.



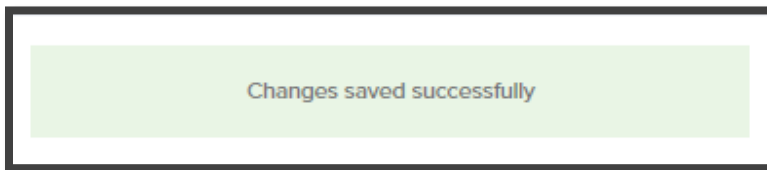
6. If there is a payment method on file, it will display when the AutoPAY indicator is selected.
7. Select either the payment method on file or the Add Payment Method option.
  - a. If selecting Add Payment, follow the prompts until the Payment methods has been added.
8. Select the desired method of payment for processing AutoPAY and select "Save changes".



9. Review the Opt-In screen which provides a detailed explanation of AutoPAY, and select Accept.



10. A message confirm the changes have been successfully saved will flash on the screen.



11. The Welcome to AutoPAY email will be sent to the email listed.

## Welcome to AutoPAY

**Hello,**

Thank you for signing up for AutoPAY with Demo Merchant1.

With AutoPAY, you can be confident your invoices will be paid on the date they're due using the payment method you provide.

### **Demo Merchant1 Contact Customer**

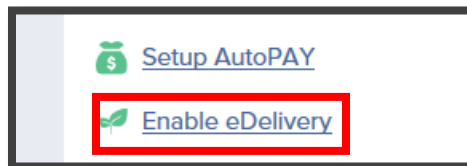
*If you have any questions regarding your account, please contact us at:  
(913) 222-3333*

### **Please log in to your account at Demo Merchant1 in order to:**

- Manage your AutoPAY settings
- Access invoice information
- View your account status
- Review your payment history
- Update your contact information

### Overview Tab – Setup eDelivery

1. After logging into the registered account, select the Enable eDelivery hyper link on the left of the Overview page.



2. The user will be directed to the My Profile tab.
3. Navigate to the **Delivery Method** section.

**Note:** Paper Delivery is always the default setting.

- If there is an email on the patient account in the AR Dashboard, it will be listed here. If no email is on file in the AR Dashboard, the fields will be empty and require information to be entered.

**Note:** This is NOT the user profile email. Email and phone number are required fields. This email will be the recipient of the eDelivery notifications.

My Profile

**Patient account**

- Payment plan >
- Payment methods >
- Contact information >

**Patient accounts**

Claire Patient (59862)

**Patient details**

For important notifications.


Use profile email address.

Email address  
*Required*


Confirm Email address  
*Required*

Phone number  
*Required*

**Delivery Method**

 eDelivery eliminates paper waste by electronically notifying you when an invoice is available.

Paper delivery  Electronic delivery

**AutoPAY settings** 

A detailed notification email will be sent after every AutoPAY payment containing your receipt information.

AutoPAY

Save changes


**NEW INSURANCE?**  
Click here to **UPDATE >**

- Select Electronic delivery. **Don't forget to uncheck Paper delivery!**



- After any field has been updated, the Save changes option will turn from gray to red and be available for selection.

### Delivery Method

 eDelivery eliminates paper waste by electronically notifying you when an invoice is available.


Paper delivery       Electronic delivery


---

### AutoPAY settings

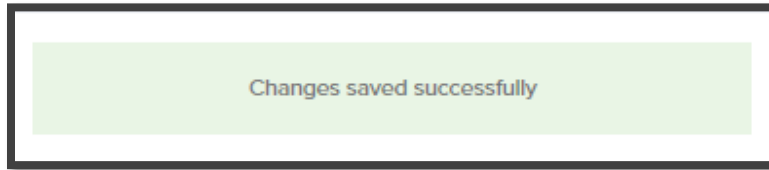
A detailed notification email will be sent after every AutoPAY payment containing your receipt information.

AutoPAY

 Credit Card (1111), Expiration: 05 / 2020  
Name: Claire Patient

 Add payment method

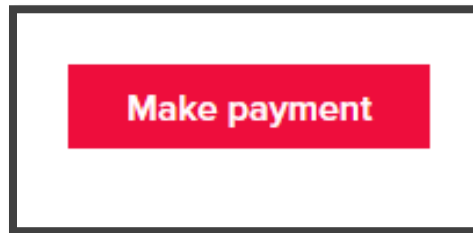
- Select Save Changes. A message confirming the changes have been successfully saved will flash on the screen.



#### Overview Tab – Make a payment

1. After logging into the registered account, select the red Make Payment icon in the middle of the page.

**Note:** The Make payment icon is not available if no balance is due.



2. From the **Payment** screen, all open invoices available for payment will be displayed.
3. **Step 1 – Open invoice(s):** Check the box next to the invoice(s) to be paid.

**Note:** If making a partial payment, select the hyper link “If you wish to pay partial amount [click here>](#)”.

**Note:** If there is an asterisk next to the Balance due, it indicates a payment has been made against the invoice, but the invoice is not yet paid off or closed in the billing system.

Payment

**Claire Patient**  
59862

Step 1 - Open invoice(s)

Select	Invoice	Due date	Balance due
<input type="checkbox"/>	... 433683	12/13/2019	\$28.20 *
<input type="checkbox"/>	... 526859	12/11/2019	\$100.00
<input type="checkbox"/>	... 625989	02/02/2020	\$154.00

\*Payment not yet applied  
If you wish to pay partial amount [click here](#)

Total payment  
\$0

4. If taking a payment against the asterisk invoice, a warning message will appear.

**PAYMENT - Warning Message**

A payment was recently processed against invoice #[526859]. Taking this payment now could result in a duplicate payment.

Cancel Proceed

5. **Step 2 – Select method of payment:** Select a payment method already on file or “Other method of payment” to enter an alternate payment method.

**Step 2 - Select method of payment**

**VISA** Credit Card (\*1111), Expiration: 05/2020  
Name: Claire Patient

Other method of payment

6. After selecting the payment method, the **Next** button will change from gray to red and be available for selection.

Payment

**Claire Patient**  
59862

**Step 1 - Open invoice(s)**

Select	Invoice	Due date	Balance due
<input type="checkbox"/>	... 433683	12/13/2019	\$28.20 *
<input checked="" type="checkbox"/>	... 526859	12/11/2019	\$100.00
<input type="checkbox"/>	... 625989	02/02/2020	\$154.00

\*Payment not yet applied  
If you wish to pay partial amount [click here](#)

Total payment  
**\$100.00**

**Step 2 - Select method of payment**

**VISA** Credit Card (\*1111), Expiration: 05/2020  
Name: Claire Patient

Other method of payment

Total payment: **\$100.00**

[Cancel](#) **Next**

- When a saved payment method on file is selected the verification screen will appear once Next is selected. If Other method of payment is selected follow the prompts until the verification screen appears.

Payment

**Claire Patient**  
59862

**Please verify that the information below is correct.**

**Invoice(s)**

Invoice	Due Date	Balance Due
526859	12/11/2019	\$100.00

Total amount: **\$100.00**

**Payment information**

**VISA** Credit Card: 1111  
Name: Claire Patient  
Expiration: 05/2020

Total amount: **\$100.00**

[Cancel](#)

- Select Edit to be taken back to the overview screen to change the invoice, payment amount, or payment method.
  - Select Next to process the payment.
- The final payment screen will allow the option to Save/print receipt or navigate to the Payment History tab.

**Payment**

**Claire Patient**  
59862

**Thank you for making your payment!**

You will receive a receipt via email and can always access a copy in your Payment History.

Your Payment of \$100.00 will be applied to the invoice(s) below. Please allow up to 7 business days for processing.

---

**Paid invoice(s)**

Invoice	Due date	Original amount	Payment
526859	12/11/2019	\$125.00	\$100.00

Total payment:  
**\$100.00**

---

**Payment information**

Status	***Approved***
Date	Feb 05, 2020, 09:34 AM
Reference #	PO202002051034594461
Transaction ID	37573229
Credit card	Visa Credit *****1111
Name on the card	Claire Patient
Billing address	C/O Bryant Nursing Home
Billing zip code	66204
Payment made to	Bpc, P.O. Box 740751 Los Angeles, CA, 90074-0670

[Save/print receipt](#)

[Payment History](#)

Overview Tab – View Invoices

1. Open invoices will display on the Overview tab.
  - a. If there are any invoices in a payment plan, a message will display below My Accounts.
  - b. Any invoices attached to the payment plan will have the calendar icon next to them and will reflect a due date of *InProgress*.

### My Accounts

You have 1 invoice in payment plan

Invoice	Due Date	Balance Due
433683	<i>In Progress</i>	\$28.20 >
526859	<i>In Progress</i>	\$100.00 >
625989	<i>In Progress</i>	\$154.00 >

- c. If AutoPAY will be processing on the invoice in the invoice in the next 24 hours, the Due Date will reflect *InProgress*.

Due Date

*In Progress*

- d. If the invoices are Past Due a message will appear below My Accounts on the Overview tab.

### My Accounts

You have 3 invoices past due

- 2. To view the invoice details, select the line item of the invoice.

#### My Accounts

You have 3 invoices past due

---

**Claire Patient** (59862)

[Setup AutoPAY](#)

[Enable eDelivery](#)

[Manage account](#)

Invoice	Due Date	Balance Due
433683	<i>In Progress</i>	\$28.20 >
526859	<i>In Progress</i>	\$100.00 >
625989	02/02/2020	\$154.00 >

[Make payment](#)

- a. Once the Invoice Details page opens, the date of service, item/service provided, and amount owed will display.

Invoice #433683 Details

<b>Claire Patient</b> 59862  From: <b>Demo Merchant</b> 180 Circle Drive Overland Park Kansas 66204	<b>Item/service provided</b>		Invoice #: 433683
	Service date	Item/Service provided	Amount
	11/21/2019	E0185 MATTRESS OVERLAY GEL FOAM	\$38.20

This is only a summary of the invoice.  
Please download printable version for full information.

Amount: **\$38.20**  
Due date: 12/13/2019  
Status: **Open**

[Download printable invoice](#)

[Back](#) [Make payment](#)

- b. To view the invoice in paper form or print the invoice, select Download printable invoice.

Invoice #433683 Details

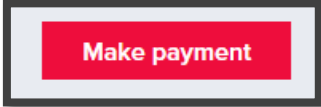
<b>Claire Patient</b> 59862  From: <b>Demo Merchant</b> 180 Circle Drive Overland Park Kansas 66204	<b>Item/service provided</b>		Invoice #: 433683
	Service date	Item/Service provided	Amount
	11/21/2019	E0185 MATTRESS OVERLAY GEL FOAM	\$38.20

This is only a summary of the invoice.  
Please download printable version for full information.

Amount: **\$38.20**  
Due date: 12/13/2019  
Status: **Open**

[Download printable invoice](#)

[Back](#) [Make payment](#)

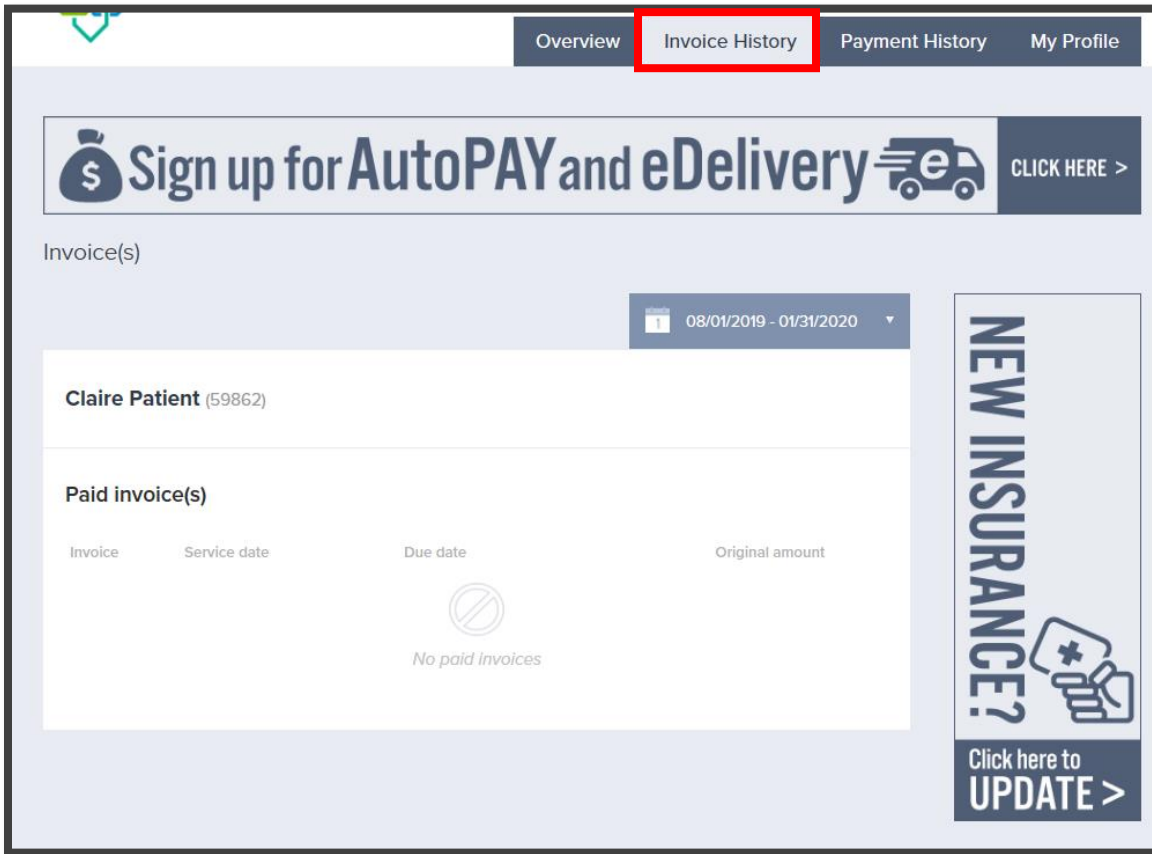


3. To make a payments invoice details screen, select

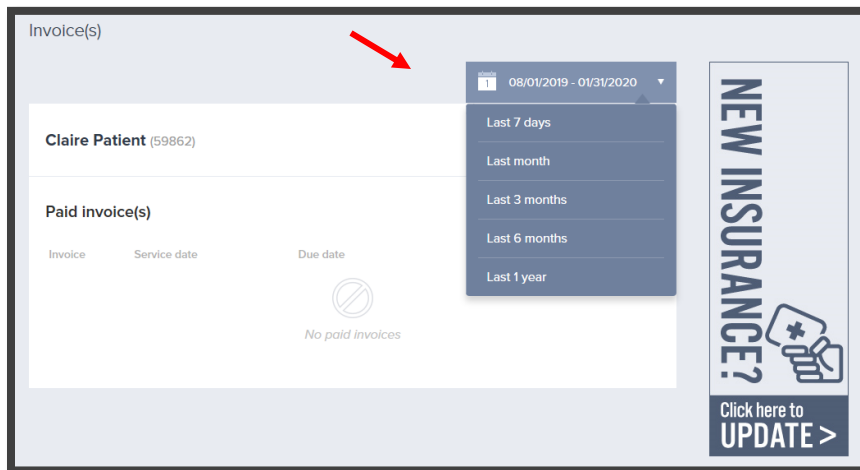


Invoice History

1. After logging into the registered account, the **Invoice History** tab will provide information regarding invoices previously paid.



2. The date range can be changed by selecting the drop-down arrow.



- When/if invoices are present, details can be accessed by selecting the line item.

**Paid invoice(s)**

Invoice	Service date	Due date	Original amount	
433722	11/19/2019	11/19/2019	\$579.48	>
526898	12/23/2019	12/23/2019	\$40.25	>
626028	12/07/2019	12/07/2019	\$63.12	>

- Details of Service date, Item/Service provided and amount are all present. To view the invoice in paper form or print the invoice, select Download printable invoice.

**Item/service provided** Invoice #: 433722

Service date	Item/Service provided	Amount
11/19/2019	OXYGEN CONTENTS - E CYLINDER	\$579.48

This is only a summary of the invoice.  
Please download printable version for full information.

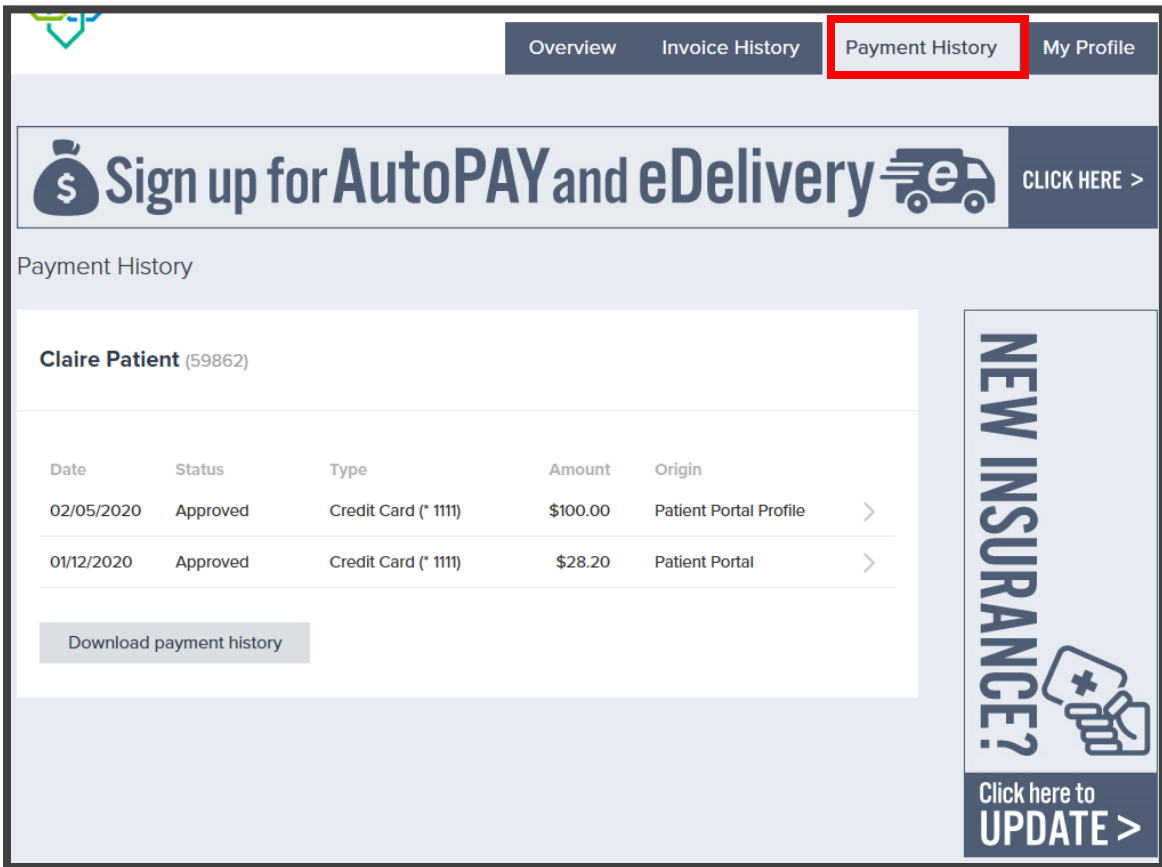
Amount: **\$579.48**  
Due date: 12/11/2019  
Status: **Paid**

[Download printable invoice](#)



[Back](#)

### Payment History

- After logging into the registered account, the **Payment History** tab will provide information regarding payment previously made on the account.



Overview Invoice History **Payment History** My Profile

 Sign up for AutoPAY and eDelivery  [CLICK HERE >](#)

Payment History

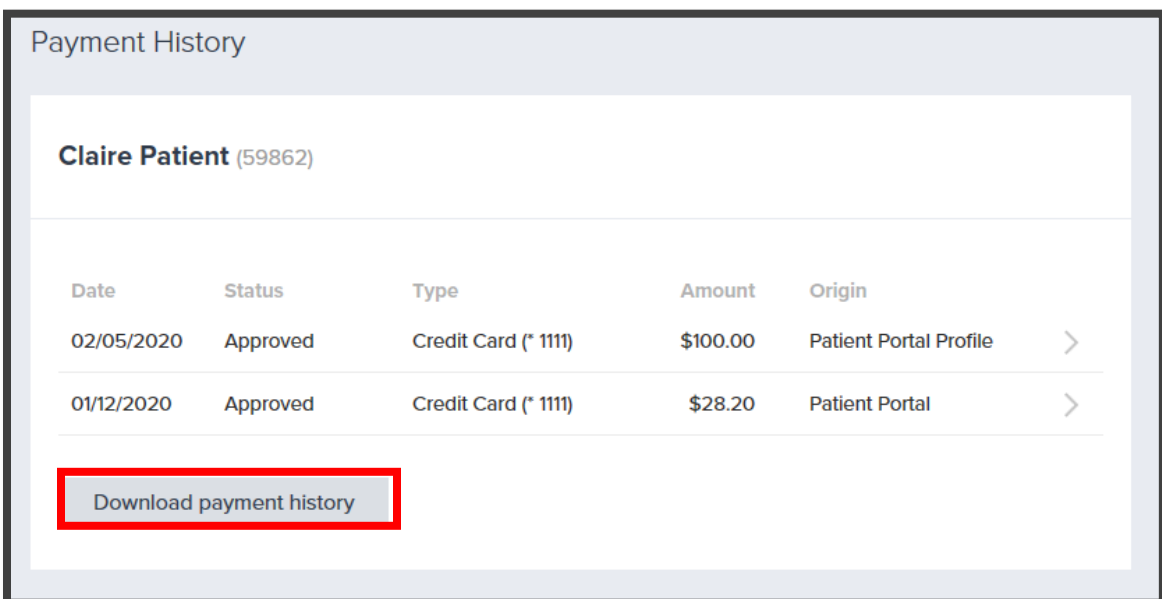
**Claire Patient** (59862)

Date	Status	Type	Amount	Origin
02/05/2020	Approved	Credit Card (* 1111)	\$100.00	Patient Portal Profile >
01/12/2020	Approved	Credit Card (* 1111)	\$28.20	Patient Portal >

[Download payment history](#)

**NEW INSURANCE?**  
Click here to **UPDATE** >

2. The full payment history can be downloaded from this screen.



Payment History

**Claire Patient** (59862)

Date	Status	Type	Amount	Origin
02/05/2020	Approved	Credit Card (* 1111)	\$100.00	Patient Portal Profile >
01/12/2020	Approved	Credit Card (* 1111)	\$28.20	Patient Portal >

[Download payment history](#)

3. Selecting the line item will allow for a receipt of payment to be visible.

Payment History

**Claire Patient** (59862)

Date	Status	Type	Amount	Origin	
02/05/2020	Approved	Credit Card (* 1111)	\$100.00	Patient Portal Profile	>
01/12/2020	Approved	Credit Card (* 1111)	\$28.20	Patient Portal	>

Download payment history

4. Selecting Save/print receipt is available for each transaction receipt.

Transaction #37573229 Summary

<b>Claire Patient</b> 59862	<b>Invoice(s)</b>			
	Invoice	Due date	Original amount	Payment
	526859	12/11/2019	\$125.00	\$100.00
	Total amount paid:			\$100.00

**Payment information**

Status: \*\*\*Approved\*\*\*

Date: Feb 05, 2020, 09:34 AM

Reference #: PO202002051034594461

Transaction ID: 37573229

Credit card: Visa Credit \*\*\*\*\*1111

Name on the card: Claire Patient

Billing address: C/O Bryant Nursing Home

Billing zip code: 66204

Payment made to: Bpc,  
P.O. Box 740751 Los Angeles, CA, 90074-0670

Save/print receipt

## My Profile

The following options will appear under the **My Profile** tab:

My Profile

**Patient account**

- Payment plan >
- Payment methods >
- Contact information >
- Share your portal >

**Patient accounts**

Claire Patient (59862)

Add patient account

**Patient details**

For important notifications.

Use profile email address.

Email address

ncihlar@brightree.com

Confirm Email address

Phone number

(333) 333-3333

**Delivery Method**

eDelivery eliminates paper waste by electronically notifying you when an invoice is available.

Paper delivery  Electronic delivery

**AutoPAY settings** 💰

A detailed notification email will be sent after every AutoPAY payment containing your receipt information.

AutoPAY

Save changes

### My Profile Tab - Patient account

1. The default page of the **My Profile** screen is the Patient account tab.
  - a. The Patient details contain the email address on file for email notifications and can be updated here.

### Patient details

**For important notifications.**

Use profile email address.

Email address

ncihlar@brightree.com


Confirm Email address

Phone number

(333) 333-3333

- b. Delivery method pertains to how information is sent for billing.  
**Note:** See the Overview tab for directions to change the Delivery method.

### Delivery Method

 eDelivery eliminates paper waste by electronically notifying you when an invoice is available.

Paper delivery →  Electronic delivery

- c. AutoPAY settings indicate if AutoPAY is on or off for a patient and what payment method attached to AutoPAY processing.  
**Note:** See Overview tab information for directions to change AutoPAY settings.

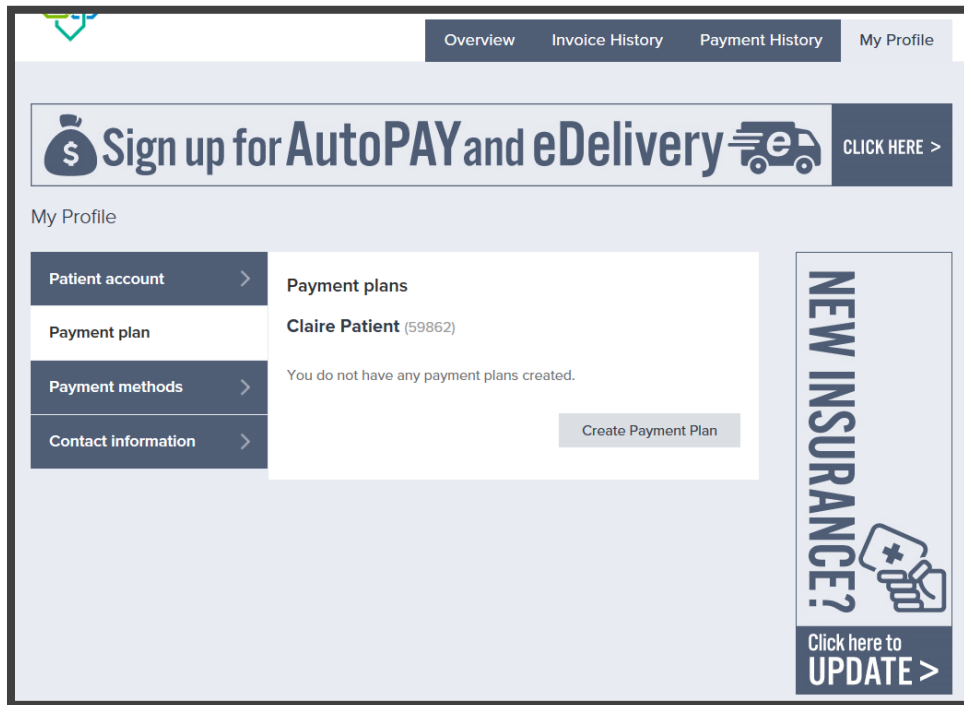
### AutoPAY settings

A detailed notification email will be sent after every AutoPAY payment containing your receipt information.

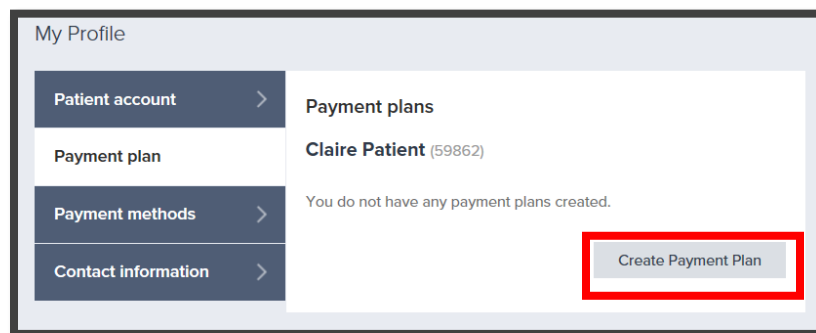
→ AutoPAY

My Profile Tab - Payment plan

The registered user has the ability to set-up a payment plan through the portal, if the feature is enabled by the provider.



1. To setup a Payment plan:
  - a. Select Create Payment Plan.



- b. **Select Invoices:** Select the invoices to be added to the payment plan and click Next.

Balance Due : **\$282.20**

**Select Invoices**

<input checked="" type="checkbox"/>	Invoice #	Service Date	Balance Due
<input checked="" type="checkbox"/>	433683	11/21/2019	\$28.20
<input checked="" type="checkbox"/>	526859	11/19/2019	\$100.00
<input checked="" type="checkbox"/>	625989	01/11/2020	\$154.00

Total Payment Plan amount : \$282.20

*Note : Minimum amount is \$100 to create the payment plan*

**Next**

- c. **Set Payment Schedule:** The Payment plan terms set by the provider will appear as your Payment options. Select the desired option, date and click Next.

**Set Payment Schedule**

**Payment Options**

2 Payments \$141.10

4 Payments \$70.55

Start Date

02/06/2020

*(Format: MM/DD/YYYY)*

**Next**



- d. **Payment Schedule:** The payment schedule will automatically calculate and appear. Confirm the Payment schedule by selecting Next.

The screenshot shows a 'Payment Schedule' section with a table containing the following data:

Date	Amount
02/06/2020	\$141.10
03/06/2020	\$141.10

A red box highlights the 'Next' button in the bottom right corner of the form.

- e. Select an existing saved payment method or follow the prompts to add a new payment method and select Next.

The screenshot shows a 'Select Payment Method' section with two radio button options:

- VISA** Credit Card (\*\*1111), Expiration: 05/2020  
Name: Claire Patient
- Other method of payment

A red arrow points to the selected VISA option. A red box highlights the 'Next' button in the bottom right corner of the form.

- f. Once the confirmation page populates, check the box to agree to the payment plan terms and select confirm.

**Confirmation**

Thank you for setting up a payment plan to be applied to your outstanding invoices totaling \$282.20

Your first payment will be charged to \*\*\*\*1111 on 02/06/2020.

The schedule payment(s) will be charged on the 6 of each month.

Payment plan confirmation email will be sent to [ncihlar@brightree.com](mailto:ncihlar@brightree.com)

I agree to the terms of this payment plan.

\* Months without this day will process payments on the last day of the month.

Confirm

- g. The Payment Plan tab will now contain the payment plan specifics. A payment confirmation email will be sent with a receipt each time the payment plan processes a payment.

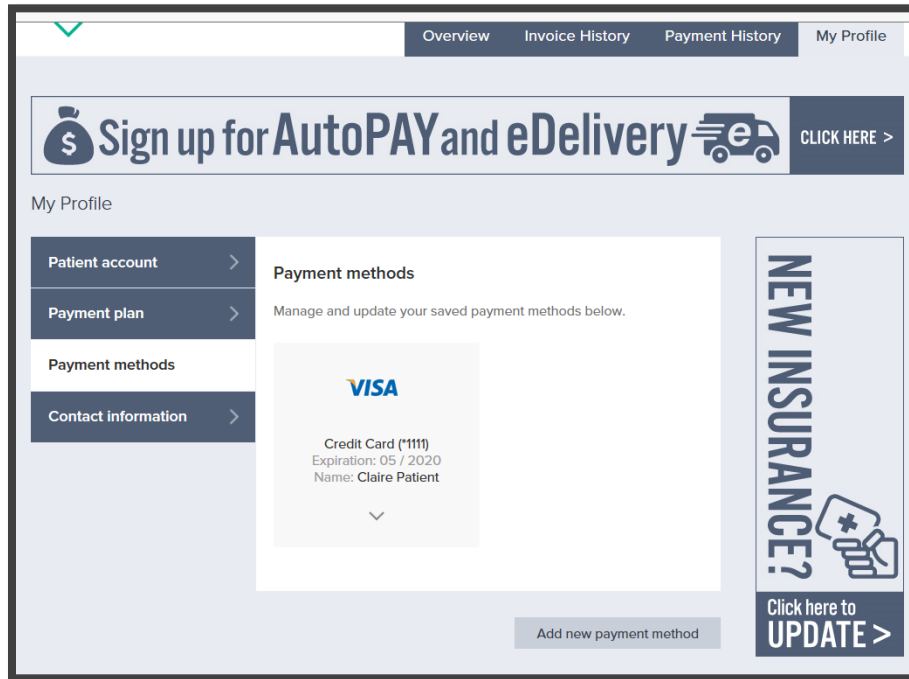
My Profile

Patient account >	Payment plans												
Payment plan	Claire Patient (59862)												
Payment methods >	Payment Plan details <span style="background-color: #76923c; color: white; padding: 2px 5px; font-weight: bold;">CURRENT</span>												
Contact information >	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 60%;">Monthly Amount</td> <td style="text-align: right;">\$141.10</td> </tr> <tr> <td>Next Payment Date</td> <td style="text-align: right;">03/06/2020</td> </tr> <tr> <td>Current Amount</td> <td style="text-align: right;">\$282.20</td> </tr> <tr> <td>Original Amount</td> <td style="text-align: right;">\$342.20</td> </tr> <tr> <td>Payoff Date</td> <td style="text-align: right;">03/06/2020</td> </tr> <tr> <td>Payment Method</td> <td style="text-align: right;">****1111 <span style="background-color: #4a7ebb; color: white; padding: 2px 5px; font-weight: bold;">VISA</span></td> </tr> </table> <p style="font-size: small; margin-top: 10px;">To make changes to the terms of this payment plan, contact our office at : (913) 222-3333</p>	Monthly Amount	\$141.10	Next Payment Date	03/06/2020	Current Amount	\$282.20	Original Amount	\$342.20	Payoff Date	03/06/2020	Payment Method	****1111 <span style="background-color: #4a7ebb; color: white; padding: 2px 5px; font-weight: bold;">VISA</span>
Monthly Amount	\$141.10												
Next Payment Date	03/06/2020												
Current Amount	\$282.20												
Original Amount	\$342.20												
Payoff Date	03/06/2020												
Payment Method	****1111 <span style="background-color: #4a7ebb; color: white; padding: 2px 5px; font-weight: bold;">VISA</span>												

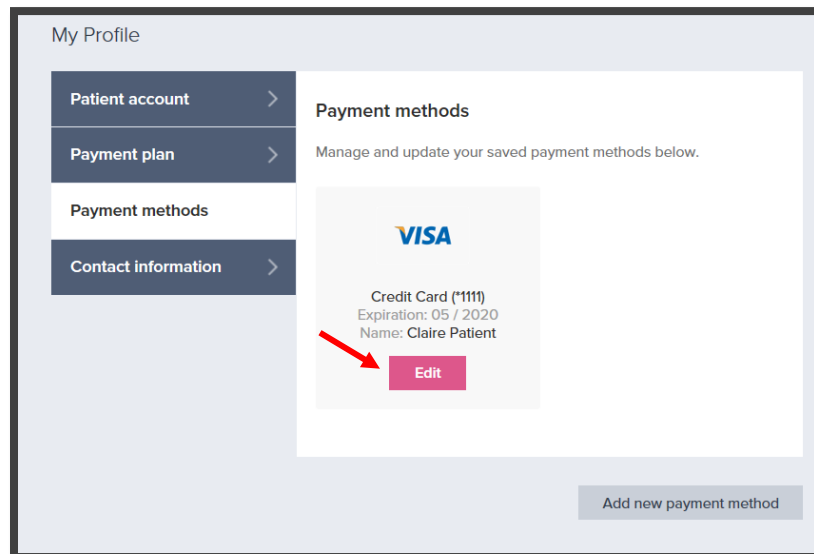
¹ Balance Due is the total amount of all open or unpaid invoices and does not reflect recent purchases or pending payments.

My Profile Tab - Payment methods

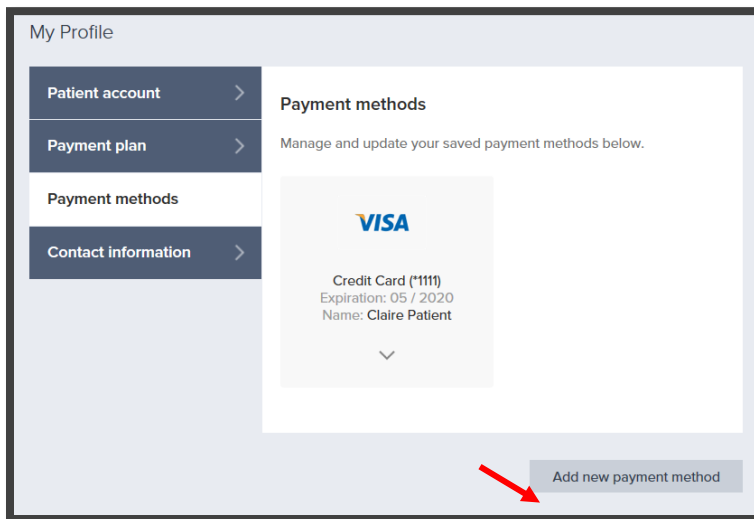
The Payment methods tab will house information pertaining to any payment method on saved on file with the provider.



1. To edit a payment method, hover on the payment method and select Edit and follow the prompts.



- To add a payment method to be saved for future use, select Add new payment method.



- Choose the payment method and enter all necessary details. Click **Continue**.

The screenshot shows the 'Add New Payment Method' form. It has three steps: 1. Choose method, 2. Enter card information, and 3. Done. Step 1 is active. Under 'Choose method', there are two options: 'Credit Card' (selected) and 'Electronic Card (eCheck)'. The 'Credit Card' option shows logos for VISA, MasterCard, Discover, and American Express. Below the options are three text input fields: 'Name as it appears on credit card', 'Billing address', and 'Zip Code'. At the bottom, there are 'Cancel' and 'Continue' buttons.

- Enter the credit card information including card number and expiration date. Click **Submit Transaction** once all information is entered.

**Note:** For security reasons, the screen to enter card information is only available for a set amount of time. The remaining time will display in the top left corner of the form.

Add New Payment Method

✓ Choose method

For security reasons this session will expire in

02:40

2 Enter card information

**Enter credit card information**

⚠ After completing the form below, click the "Submit Transaction" button only once.

To complete your secure transaction, please enter credit card information and click Submit Transaction button.

This secure payment service is provided by [Worldpay](#)

**Address Information**

---

**Billing Address**  
 Claire Patient  
 12345 Main Street  
 11111

**Card Information**

---

\*Card Number:

\*Expiration:

secured by **worldpay**

3 Done

- Messaging will appear indicating the new payment method has been successfully added. Click **Done** to exit the screen.

Add New Payment Method

✓ Choose method

✓ Enter card information

3 Done

You have successfully added a new payment method

Credit Card: \*\*\*\*\*1111

**VISA** Name: Claire Patient

Expiration: 1 / 34

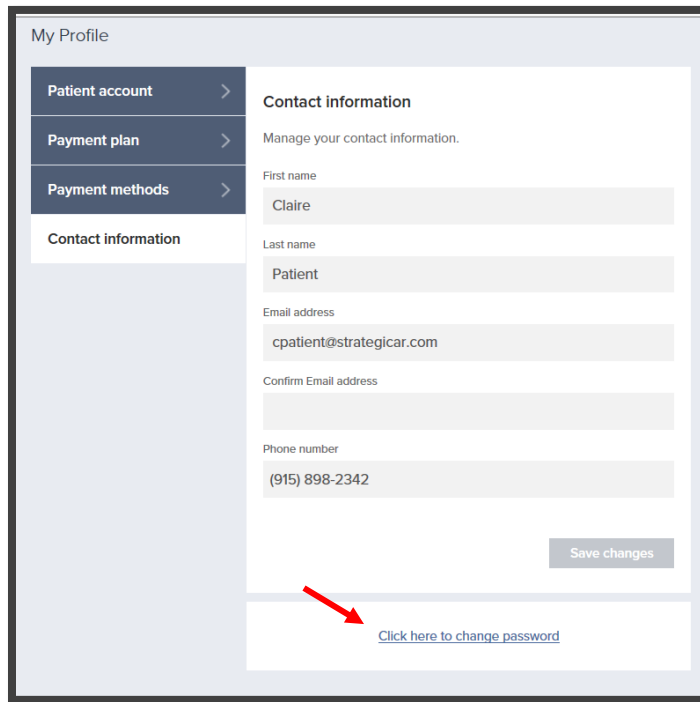
Done

My Profile Tab - Contact information

The Contact information tab houses the email address used as the username to log into the Patient portal as well as the option to change the password.

1. To update the username used to log into the Patient Portal, update the Email address area and select Save changes.

2. To change the password, select the [Click here to change password](#) link.



The screenshot shows a 'My Profile' page with a sidebar menu on the left containing 'Patient account', 'Payment plan', 'Payment methods', and 'Contact information'. The main content area is titled 'Contact information' and includes a sub-header 'Manage your contact information.' Below this are several input fields: 'First name' (filled with 'Claire'), 'Last name' (filled with 'Patient'), 'Email address' (filled with 'cpatient@strategicar.com'), 'Confirm Email address' (empty), and 'Phone number' (filled with '(915) 898-2342'). A 'Save changes' button is located at the bottom right of the form. Below the form, a red arrow points to a blue underlined link that reads 'Click here to change password'.

- a. Follow the Password criteria to populate the fields and select Change password.

**Change password**

Current password

New password

Confirm new password

**Password criteria**

- Must be at least 8 characters long.
- Must contain at least 1 upper-case letter.
- Must contain at least 1 lower-case letter.
- Must contain at least 1 number.
- New Password and Confirm Password fields must match.

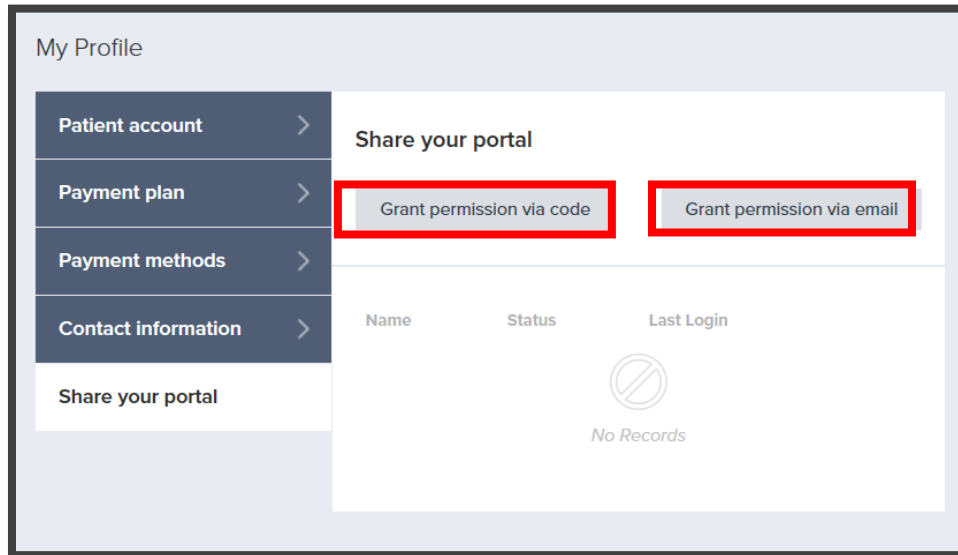
**Change password**

My Profile Tab – Share your portal

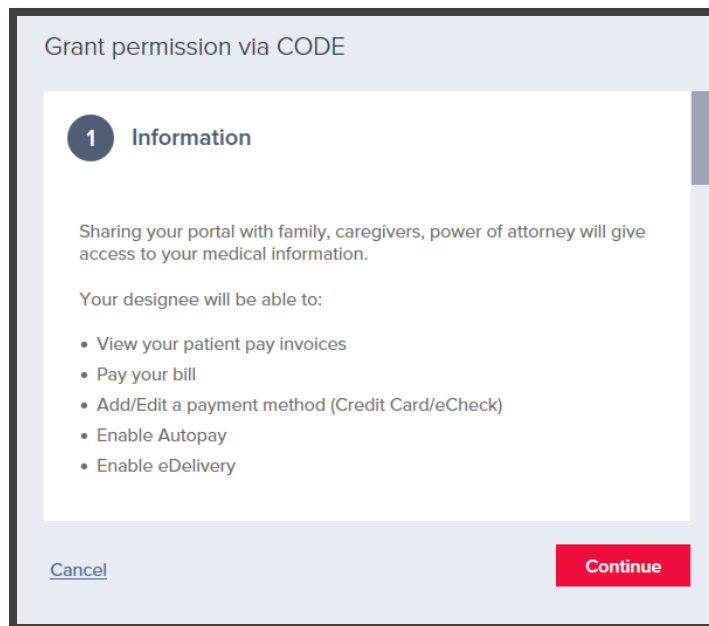
Through the patient portal, the patient can grant access to a non-patient (Family member, caregiver, etc.) via the patient portal.



1. From the **Share your portal** tab, select **Grant permission via code** or **Grant permission via email**.



2. Select Continue.



3. Enter user details and select **Grant**.

Grant permission via CODE

Information **2** User Details *All fields are required*

First name (Optional)  
Test

Last name  
Test

[Cancel](#) [Grant](#)

Grant permission via EMAIL

Information **2** User Details *All fields are required*

First name (Optional)  
Test

Last name  
Test

Email address  
estellanic@hotmail.com

Confirm email address  
estellanic@hotmail.com

[Cancel](#) [Grant](#)

Grant permission via CODE

Information **3** Confirmation

You have successfully granted the user with the Portal access.  
Kindly use the provided code to get the patient access.

**226-52-2M**

[Back to my profile](#)

Grant permission via EMAIL

Information **3** Confirmation

You have successfully granted the user with the Portal access.  
You will receive an email on the specified email address. Kindly follow the link to get the patient access.

[Back to my profile](#)

- a. The non-patient user will login from the Home page as Register via code or utilizing the confirm email link.
- b. Once complete, the non-patient user will appear within My Profile>Share your portal as active.

My Profile

Patient account >

Payment plan >

Payment methods >

Contact information >

Share your portal

Share your portal

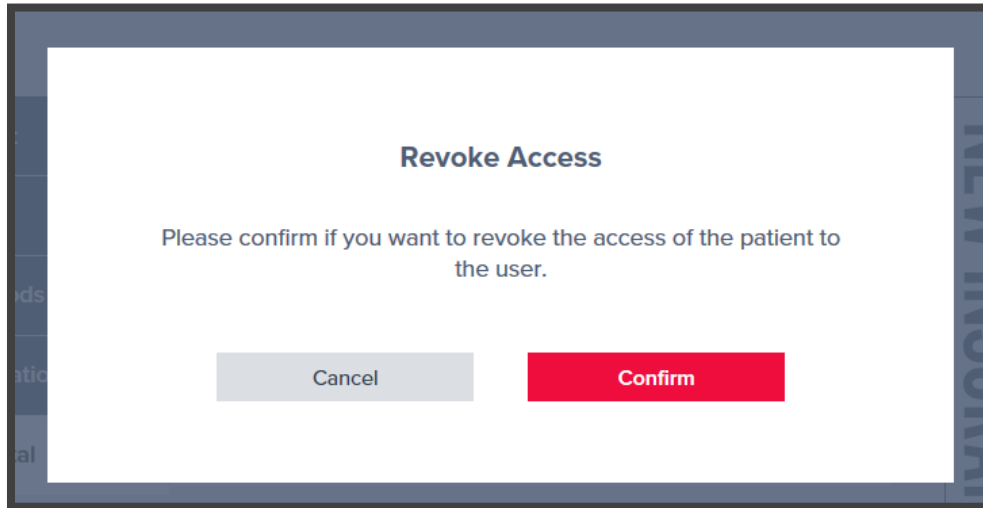
Grant permission via code

Grant permission via email

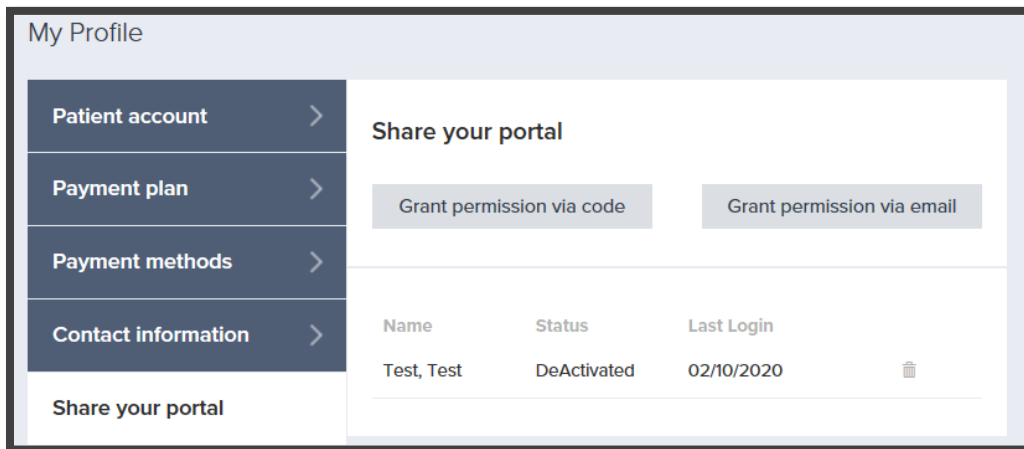
Name	Status	Last Login	
Test, Test	Active	02/10/2020	

My Profile Tab – Revoking shared access

1. To revoke shared access for a user, from the **Share your portal** screen:
  - a. Select the trash can icon next to a user.

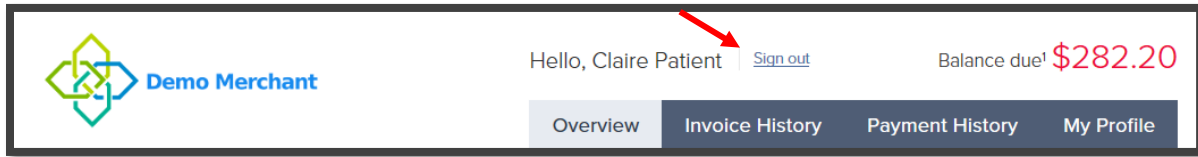


- b. Select Confirm. The user will now show "DeActivated".



Signing out of the Portal

**Sign out** of the Patient Portal by navigating to the top of the page. Select Sign Out.



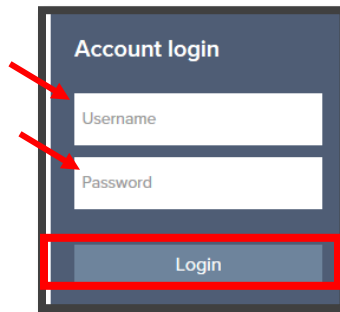
Options if multiple bill pay sites

Patients may encounter a need to be registered in multiple Patient Portal sites.

If the patient is already a Registered User on an existing Patient Portal they can use those same credentials to become a Registered User on an additional site.

To do this, the patient will navigate to the **NEW** site.

1. Use the same username/email and password that they use to access the **PREVIOUS** site to which they are already a Registered User. This will be entered in the Account login area just as the patient would if they were in the site to which they are already registered.



2. The Create Profile screen for the new site will populate. The patient will need to enter their Account # and Invoice # for the **NEW** site and Select Complete Registration. Once complete, both sites can now be accessed using the same credentials. The patient will **NOT** have visibility to both sites in 1 login. They will need to log in to each separately.

Create Profile

1 Create user profile

2 Add patient accounts

3 Summary

Thank you for creating your user profile!

**Patient #1 - Account information**

I am the patient (use the same last name as my user profile)

First name (Optional)

Last name

Account #

Invoice #

Add a family member to make a payment for medical services they received. You can add patient accounts anytime after completing registration by selecting "My Profile."  
Please enter the account information found on the patient invoice.

Add next patient account

Complete Registration