

DrChrono Payments: Saving Credit Card Information without Processing a Payment

07/24/2024 2:00 pm EDT

With DrChrono Payments, you can save patient credit card information without processing a payment, all from the patient's demographic section.

- While in a patient's chart, navigate to the demographics section and select the onpatient Payments tab.

Primary Provider:

Important Demographics Insurances Authorizations Smoking Status Flags Balance **onpatient Payments**

✓ Sufficient patient demographics to bill insurance.

There are 3 main sections on this page:

- **Balance**- This is where you can process a payment.
- **Saved Cards**- This is where you can save card information without processing a charge as well as setting a default card if there is more than one card saved.
- **Transaction History**- Will document payments processed on the account.

Patient Payments

Balance		Process Payment		Saved Cards		Add Card
Total Billed	\$925.00	Total Allowed	\$925.00	Card	Name	
Total Allocated	\$50.00	Total Adjustment	\$0.00	No payment methods saved		
Total Patient Paid:	\$50.00	Total Insurance Paid	\$0.00			
Patient Balance:	\$125.00	Insurance Balance:	\$750.00			

Transaction History

Created Date	Date of Service	Amount	PaySimple Transaction #
No payments processed			

Save Demographics

Saving Credit Card Information

- Under the Balance tab, click on the green **Add Card** tab.
- A new tab will open. This is where you will enter the card information, including the cardholder's name, credit card information, the expiration date on the card, and the CVV security code.
- Once the information is entered, click on the green **Save Card Details**.

Cardholder Name *

Credit Card *

Expiration *

Security Code *

Close

Save Card Details
