DrChrono Payments: Processing a patient payment on the web

07/24/2024 2:00 pm EDT

DrChrono is happy to offer your practice a simple, efficient, and convenient way to collect patient payments.

After you set up your account with DrChrono Payments, you are ready to process a payment.

• Navigate to Billing > Patient Payments > Payments tab.

dr chrono	dr chrono												
Schedule C	Clinical	Patients	Reports	Billing	Account	Marketplace	Help	₩	×				
Billing Summar	у			Patient	Payments	Payments	Line I	tems	Logs	Statements	Balance		
Select the	e patient	t who is i	making a	payment									
Patient F	Paymer	nts	Payments	Line I	items Lo	gs Staten	nents	Bala	ance				
Patient From	То	÷	Filte	r by Range	: \$	- \$			Pro	vider: All -			
Simp	ole: On	Conde	ensed: On	Interr	nal: Off								
Please select	t a patier	nt.											

• Click the green "+ Add" button

Patient Payments	Payments	Line Items	Logs	Statements	Balance
Emily (Demo) Henry	Filter	by Range: \$		- (\$	Provide
Simple: On Cor	ndensed: On	Internal: Off]		
		Total Paid		Allocated Paym	ent (Paid to Appt)
Emily (Demo) Henry					
Print/Export - Add	←				

• Under Payment Method, you will have the option to select DrChrono Payments

Payment Date						
Appointment			~			
Line Item			~			
Provider			~			
Payment Method	- Select	Гуре -	~			
Туре	Credit		~			
Notes						
Amount	s		lo			
Anoun	U					
			C	Cancel	Add	
ew Cash Payment [Date					
Payment D						
					~	
Payment D	nent	-No Line Ite	əm-		~	
Payment E Appointm	tem					
Payment E Appointm Line I Prov	tem	-No Line Ite - Select T	ype -			
Payment E Appointm Line I Prov Payment Met	hent (tem ·	- Select Ty DrChrono Cash	ype -			
Payment D Appointr Line I Prov Payment Met	hent ider hod v	- Select Ty DrChrono Cash Check	ype -			
Payment D Appointr Line I Prov Payment Met	hent (tem ·	- Select Ty DrChrono Cash Check Debit	ype – Payments			
Payment E Appointm Line I Prov Payment Met T No	hent (ider (hod v ÿpe (- Select Ty DrChrono Cash Check	ype - Payments ⁻ d			
Payment D Appointr Line I Prov Payment Met	hent (ider (hod v ÿpe (- Select T DrChrono Cash Check Debit Credit Car American Visa	ype - Payments d Express			
Payment E Appointm Line I Prov Payment Met T No	hent (ider (hod v ÿpe (- Select Ty DrChrono Cash Check Debit Credit Car American	ype - Payments d Express			

• Once you select DrChrono Payments, additional fields will open. They will give you the option to swipe the patient's credit card or enter the information manually.

×

New Cash			×
Provider		~	
Payment Method		~	
Туре	Credit	~	
Notes			
Amount	\$	Required	
Card on File		~	
Sw	ipe Card	Manually Enter Card	
	Save	e card information	
		Cancel	Pay with card

• You will also have the option of saving the card information for future payments. The information would be available in the drop-down titled "Card on File". You do not have to select this option for the payment to process.

New Cash				2
Provider			~	
Payment Method			~	
Туре	Credit		~	
Notes				
Amount	\$	F	Required	
Card on File			~	
Swip	e Card	Manually E	nter Card	
	Save	card informatio	on	
			Cancel	Pay with card

- You can swipe the patient's card using available readers (catalog) or manually enter it. If you choose to manually enter the information, you will be asked for the Cardholder's name, Credit Card number, Expiration date (mm/yy), CVV Security Code, and Zip/Postal code.
- After processing, it will be listed as Payment Method "PSMP".

	#	Unallocated	Posted Date	Payment Date	Appointment	Line Item	Provider	Payment Method	Туре	Notes	Amount	Total	
0	0	\$12.00						PSMP	Credit	0	\$12.00		Refund

• If needed, you can print a receipt for the patient by clicking on the receipt button on the right side of the screen.