

# DrChrono Payments: Processing a payment from the appointment screen

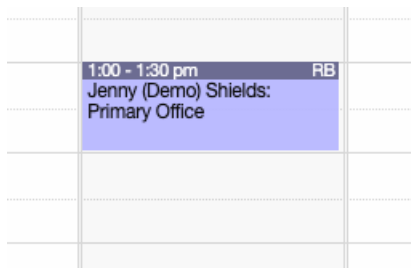
07/24/2024 2:00 pm EDT

When your patient arrives for their appointment, you can easily collect and process their copay or other payment directly from the appointment/calendar.

All patient data listed in this article is sample data. This is not a real person or real patient data.

Here's how:

- Navigate to the calendar and select the patient's appointment



- Select the Billing tab

### Schedule Appointment

Appointment **Billing** Eligibility Vitals Growthcharts Flags Log Comm. Revisions Custom Data MU Helper

Type  Appointment  Video Visit  Walk-in  Transition of Care  Referral

**Provider**  **Billing** - If different to provider -

**Supervising** - If different to provider -

**Patient** Jenny (Demo) Shields - 10/21/19€

**Office:** Primary Office

**Reason:**

**Profile:** -----

**Scheduled:** |  Time

**Eligibility Profile:** -----

**Duration:** 30 minutes  Allow overlapping

**Exam:** Exam 1

**Notes:**

**Color:**

**Consent Forms:**  HIPAA Data Use Agreement (default)

**Status:**

0h 18m

Recurring Appointment A scheduled appointment cannot be converted to a recurring series.  
 Arrange a Follow-up Reminder  
 View Active Reminders:

- Click on the blue plus + next to "Patient Payment"

**Schedule Appointment** ✕

Appointment **Billing** Eligibility Vitals Growthcharts Flags Log Comm. Revisions Custom Data MU Helper

Institutional Claim Patient SuperBill Clinical Note Billing Details Other Forms ▾

**Billing Status**

ICD Version

Primary Insurer

Secondary Insurer

Patient Payment

Pre Authorization Approval

Referral #

Payment Profile

Billing Profile

Billing Pick List

Diagnosis Pick List

**HCFA Box 10 - Is patient's condition related to:**

Employment

Auto Accident

Other Accident

Onset Date Type

Onset Date

Other Date Type

Other Date

**ICD-10 Codes**  ▾

#	Code	Description

**CPT Codes**  ▾

Code	Description	Price (\$)

**ICD-9 Codes to Convert**  ▾

#	Code	Description

**HCPCS Codes**  ▾

Code	Description	Price (\$)

**NDC Codes**  ▾

NDC Code	Quantity	Units	Line Item

**Custom Codes**  ▾

Code	Description	Price (\$)

Include note in EDI Billing:

- A separate window will open where you can process the patient's payment.

**New Cash** [Close]

Payment Date

Appointment

Line Item

Provider

Payment Method

Type

Notes

Amount \$

Code	Applied	Balance	Payment Type

[Cancel] [Pay with card]

- The Payment Date, Appointment, and Provider should automatically populate based on the information from the patient appointment you selected.
- You will want to select "DrChrono Payments" from the Payment Method drop-down.
- After entering the amount of the patient's payment (copay, deductible, cash pay, etc) in the Amount column, scroll down to select whether you will swipe the patient's credit card, or manually enter the information.

Code	Applied	Balance	Payment Type

[Swipe Card] [Manually Enter Card]

Save card information

[Cancel] [Pay with card]

- Depending on which option you select, you will see one of two different screens.
  - Swipe Card -

Code	Applied	Balance	Payment Type
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Manually Enter Card



Swipe Card Now

Save card information

- Manually Enter Card -

### New Cash



Cardholder Name \*

Credit Card \*

Expiration \*

Security Code \*

Cancel

Pay with card

- Once the payment is processed, the system will post it to the appointment and allow you to print the patient a receipt.