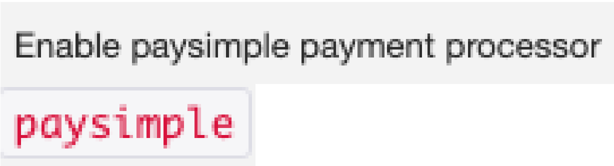
INTERNAL: DrChrono Payments - how to turn on the option for a client

07/24/2024 5:45 pm EDT

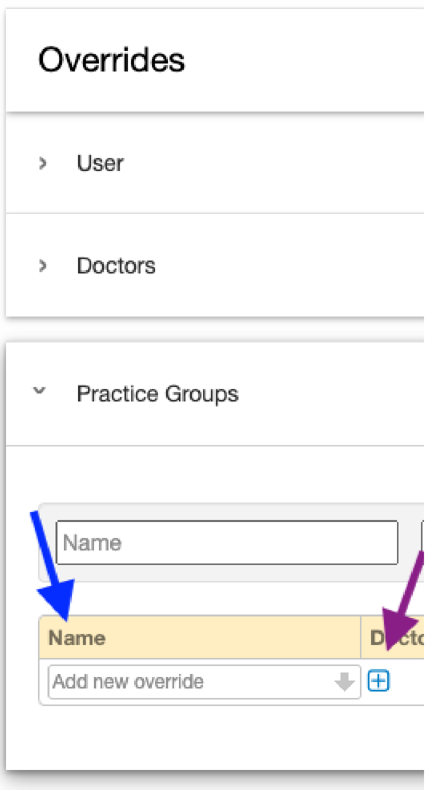
If a client requests to be turned on for DrChrono Payments (aka PaySimple), here's how you can make that happen.

#1 - the client **must** be on updated Patient Payments (v2). It **won't** work on the previous version(v1). (Note - as of May 2024 - all DrC clients should be on the updated patient payment option)

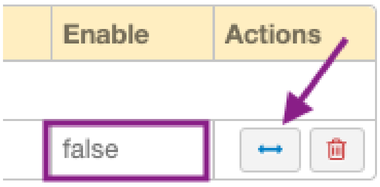
- The feature is under the Feature Rollout Tool (FRT) / Swords > Feature Rollout Tool.



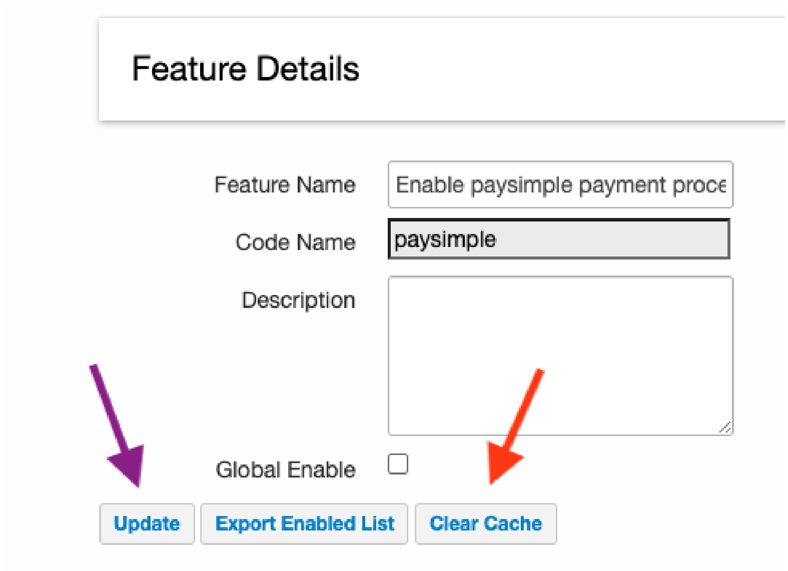
- Click on the blue pencil on the right
- Scroll down to the section labeled Overrides
- Expand the column matching who you are turning on (individual doc/practice group)
- Look up the practice by typing their name in the box by the blue arrow
- Once found and selected, click on the blue plus by the purple arrow.



- Once added, scroll over to the right and click on the blue line with arrows on both ends. That will change the "false" word under the Enable column to "true". You can click the blue line again to turn it back to "false" if needed.



- Once that is done, scroll up to the top. Click on Update (purple arrow) and then Clear Cache (orange arrow).



Viola! The client should now have the option to add DrChrono to their account. They need to go to Account > Provider Settings > Patient Payments. They should see the option to connect their DrChrono account to their DrChrono Payments account.