

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

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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.



Enable paysimple payment processor

paysimple

- 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.

The screenshot shows the 'Overrides' section of the Feature Rollout Tool. It is divided into three expandable sections: 'User', 'Doctors', and 'Practice Groups'. The 'Practice Groups' section is expanded, revealing a search box labeled 'Name' and a table. The table has two columns: 'Name' and 'D etc'. Below the table is a search bar with the text 'Add new override' and a plus sign icon. A blue arrow points to the search box, and a purple arrow points to the plus sign icon.

- 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.

Enable	Actions
false	 

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

Feature Details

Feature Name

Code Name

Description

Global Enable

Update
Export Enabled List
Clear Cache

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.


Account Settings

Profile
General
Email
Medical Billing
eRx Info
Services
Usage
Sample Data
Security
Patient Payments

General

Require balance Require an outstanding patient balance for credit card payments

DrChrono Payments


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