

Patient Payment Plans: Setting up your DrChrono account to accept patient payment plans

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In order to set up payment plans for your patients within your DrChrono account, you first need to decide on a few parameters including:

- The minimum monthly payment amount your office will accept.
- The minimum patient balance your office will allow to be placed on a payment plan.
- The minimum and maximum number of months your office will allow payments to be stretched over.

**** Please note processing patient payments through payment plans requires that you are utilizing DrChrono Payments ****

To set these for your office, follow the steps below:

- Navigate to Account > Provider Settings > Patient Payments
- Under the header **Payment Plan Settings**, you will see the following options:

Payment Plan Settings

Minimum Payment Amount	<input type="text"/>	Minimum payment amount that is allowed for a payment plan.
Onpatient Directed Payment Plan	<input type="checkbox"/>	Allow patient directed payment plans through OnPatient.
Minimum Patient Balance	<input type="text"/>	Minimum patient balance amount allowed for patient directed payment plans
Maximum Patient Balance	<input type="text"/>	Maximum patient balance amount allowed for patient directed payment plans
Minimum Monthly Installments	<input type="text"/>	Minimum amount of months
Maximum Monthly Installments	<input type="text"/>	Maximum amount of months
Recurring Payment	<input type="checkbox"/>	Allow recurring payments automatically for patients who have saved cards on file

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- **Minimum Payment Amount** - this is the minimum amount you will accept as a monthly payment
- **OnPatient Directed Payment Plan** - enabling this click box will allow your patients to set up their own payment plans through their OnPatient account. They would be subject to the parameters you set in your account settings.
- **Minimum Patient Balance** - this is the minimum amount you will allow patients to set up on a payment plan through their OnPatient account.
- **Maximum Patient Balance** - this is the maximum amount you will allow patients to set up on a payment plan through their OnPatient account.
- **Minimum Monthly Installments** - this is the minimum amount of months allowed for a payment plan
- **Maximum Monthly Installments** - this is the maximum amount of months allowed for a payment plan
- **Recurring Payment** - this will allow patients with a credit card on file to set a recurring charge to satisfy

their monthly payment plan amount

Once you have made your selections, click on **Update Entire Profile**.

Update Entire Profile
