# Patient Payment Plans: Creating a plan for your patient

07/24/2024 7:15 pm EDT

Once you have set the parameters for your account for patient payment plans, you can set up an individual patient plan for your patients.

Here's how:

• Navigate to your patient's chart and select the OnPatient Payment tab > Patient Payment Plan

	Important	Demographics	Insurances	Authorizations	Smoking Status	Flags	Balance	onpatient Payments	
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• Under the Patient Payment Plan header, select + New Payment Plan

Patient photo	Peter Dj	ango (Male   29 years old   Dec. 2	1, 1993 )			DJPE000
	Address:	(555) 555-1234 Email: Missing 123 Example Street Sample City , California 55555	Date Added: April 25, 2023 Last Scheduled Appt: Tue May 02, 2023 Next Scheduled Appt: Tue May 02, 2023			
		Adult Immunization Schedule Age: 27-49				
Primary Provider: Randi Beaver	s					
New Referral Fax Demographics	Print Demographics				Apple Health App D	ata Vitals + Schedule New Appointme
Important Demographics Insurance	as Authorizations	Smoking Status Flags Balance	onpatient Payments			
Patient Payments						
Balance			Process Payment	Saved Cards		Add C
Total Billed	\$0.00	Total Allowed	\$0.00	Card	Name	
Total Allocated	\$0.00	Total Adjustment	\$0.00	No payment methods saved		
Total Patient Paid:	\$0.00	Total Insurance Paid	\$0.00			,
Patient Balance:	\$0.00	Insurance Balance:	\$0.00			
Patient Payment Plan Auto Payment E	nabled					+ New Payment F
Due Date	Payment Amount		Estimated Remaining Balance		Status	Action
No Payment Plan Has Been Set						
	+ New	Payment Plan				
Action						

- The details window will open. You will have 2 separate options for the payment plan type. One will consider the total patient balance where you will be able to select the dollar amount to be included in the payment plan.
  - Using the screenshot below, if you only want to include \$3,000 in the payment plan, you would enter that on the "Payment Plan Amount" line.

Payment Option	<ul> <li>Patient Total Balance</li> <li>Selected Appointments</li> </ul>
Patient Total Balance	5787.56
Payment Plan Amount	\$ XX.XX
Duration	~
Monthly Payment	0
First Payment Date	mm/dd/yyyy
	Close Create Payment Plan

• The other will allow you to select specific appointments to include in the plan.

Create Payment Plan	×
Payment Option	<ul> <li>Patient Total Balance</li> <li>Selected Appointments</li> </ul>
Appointment	None selected -
Total Balance of Selected Appointments	0
Duration	~
Monthly Payment	0
First Payment Date	mm/dd/yyyy
	Close Create Payment Plan

• If you click on the down arrow next to "Appointment", you will be shown the appointments in the Balance Due status. You can select which appointments you would like to include in the payment plan.

Payment Option	<ul> <li>Patient Total Balance</li> <li>Selected Appointments</li> </ul>		
Appointment	11/03/2023 08:00AM (\$6.12 - Balance Due) -		
Total Balance of Selected Appointments Duration	<ul> <li>12/01/2023 09:45AM (\$19.00 - Balance Due)</li> <li>11/23/2023 03:00PM (\$10.52 - Balance Due)</li> <li>11/13/2023 04:45PM (\$43.07 - Balance Due)</li> </ul>		
Monthly Payment	<ul> <li>11/10/2023 05:15PM (\$55.77 - Balance Due)</li> <li>11/06/2023 05:45PM (\$6.09 - Balance Due)</li> </ul>		
First Payment Date	<ul> <li>✓ 11/03/2023 08:00AM (\$6.12 - Balance Due)</li> <li>□ 10/13/2023 11:30AM (\$0.70 - Balance Due)</li> </ul>		
	Close Create Payment Plan		

- Payment Option -
  - **Patient Total Balance** This will consider the total patient balance when setting up a payment plan.
  - Selected Appointments This will allow you to select individual appointments to be included in a
    payment plan.
- **Appointment** The drop-down will allow you to select individual appointments to be included in the patient's payment plan.
- **Total Balance of Selected Appointments** The total dollar amount to be included in the patient's payment plan.
- **Duration** How long will the payment plan last? The available options can be customized by your practice.
- **Monthly Payment** The system will calculate this automatically based on the amount due and the plan's duration.
- First Payment Date The date the first payment will be charged to the card saved on file.
- Enable Auto Payment This will automatically charge the patient's default credit card on file, the amount due, up to the payment plan amount, on the payment date. This feature will only work if you are utilizing DrChrono Payments as your payment processor.

**Please note** - if you select "enable auto payment", an additional line will open to allow you to enter the patient's credit card if there is not one saved to the patient's chart. The recurring charge feature will only work if you are utilizing DrChrono Payments as your payment processor.

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	Payment Option	<ul> <li>Patient Total Balance</li> <li>Selected Appointments</li> </ul>	
I	Patient Total Balance	7146.82	
Р	ayment Plan Amount	\$ 0	
	Duration	~	
	Monthly Payment	0	
	First Payment Date	mm/dd/yyyy	
E	Enable Auto Payment		
	Card	<b>~</b>	
		No cards available 🗸	
		Close Create Payment Pl	an

## **Examples:**

**Example #1** - The patient has a \$100 balance and wants to pay it off over 4 months. The office staff would enter the payment plan amount (\$100) and the duration (4 months). The system would automatically calculate the monthly payment as \$25.00.

Create Payment Plan	×
Payment Option	<ul> <li>Patient Total Balance</li> <li>Selected Appointments</li> </ul>
Patient Total Balance	100.00
Payment Plan Amount	\$ 100.00
Duration	4 Months 🗸
Monthly Payment	25.00
First Payment Date	mm/dd/yyyy
Enable Auto Payment	
	Close Create Payment Plan

**Example #2** - The patient has a \$100 balance and wants to pay it off over 2 months. The office staff would enter the payment plan amount (\$100) and the duration (2 months). The system would automatically calculate the monthly payment as \$50.00.

Payment Option	<ul> <li>Patient Total Balance</li> <li>Selected Appointments</li> </ul>
Patient Total Balance	100.00
Payment Plan Amount	\$ 100.00
Duration	2 Months
Monthly Payment	50.00
First Payment Date	mm/dd/yyyy
Enable Auto Payment	
	Close Create Payment Plan

Once the patient and office agree on the plan (amount, duration, and card to charge), click on Create Payment Plan.

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The scheduled payments will appear under the Patient Payment Plan heading.

#### Patient Payment Plan Auto Payment Enabled

Due Date	Payment Amount
Oct 1, 2023 12:00:00 AM	50.00
Sep 1, 2023 12:00:00 AM	50.00