Patient Payment Plans: Processing monthly payment plan payments

07/24/2024 7:15 pm EDT

When you have patients who are on monthly payment plans, often it is helpful to see all of the plans at once. This can help budgeting within the office by knowing how many payments and their amounts which expected in a given month.

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

To access the report, navigate to Reports > Patient Payment Plan Report.

This screen will list:
- Patient's Name
- Payment Plan Creation Date
- Date of Last Payment
- Date of Next Payment
- Next Payment Amount
- Remaining Balance
- Original Total

Patient Payment Plan

⇕ Patient	⇕ Plan Creation Date	⇕ Date of Last Payment	⇕ Date of Next Payment	⇕ Next Payment Amount	⇕ Remaining Balance	⇕ Original Total	Action
Peter Django	08/29/2023	N/A	12/30/2023	$16.67	$100.02	$100.02	Pay Skip
Amy (Demo) Martinez	11/15/2023	N/A	12/31/2023	$133.76	$3210.33	$3210.33	Pay Skip
Heather (Demo) Hill	11/16/2023	N/A	12/31/2023	$333.40	$2000.45	$2000.45	Pay Skip
sample sample	11/20/2023	N/A	12/31/2023	$25.00	$125.00	$125.00	Pay Skip
Christopher (Demo) Cox	12/04/2023	N/A	01/17/2024	$135.50	$3252.17	$3252.17	Pay Skip
Kenneth (Demo) Parker	12/04/2023	N/A	12/08/2023	$218.25	$3492.01	$3492.01	Pay Skip

Each of these columns is sortable ascending and descending by clicking on the up/down arrow next to the column header.

Date of Next Payment	Next Payment Amount
11/30/2023	$16.67
12/01/2023	$31.25

You can also process a payment from this screen by clicking on the "Pay" button on the right side of the screen.

- You will first see this screen where you will click on **Pay With Card** to process the payment. Once you click on pay with card, you will be able to process the payment.

Process Patient Payment Plan Payment   ×

Close   Pay With Card