## **Customizing your available payment** types

07/24/2024 1:40 pm EDT

You now can customize the options available as payment types when your office posts patient payments. For example, if your office does not accept checks, you can remove that option from the list of available payment types so it cannot be selected.

If you would like to utilize this feature, please reach out to your account manager, or support and ask for the feature to be turned on for your account.

Once it is turned on, you can edit your available payment types in your account settings section.

• Navigate to Account > Provider Settings



• Select the Medical Billing tab

Acco	unt Se	etting	S						
Profile	General	Email	Medical Billing	eRx Info	Services	Usage	Sample Data	Security	Patient Payments

• Scroll down to the Miscellaneous section.

## Miscellaneous

Default ICD Code Version

Copying billing respects provider Copy Proc From Pt's Last Appt

• Near the bottom of the list under Miscellaneous, you will see an option titled "Payment Methods"

Payment Methods	None selected -

Update Entire Profile

• If you click on the dropdown, you will see a menu of available payment types

Payment Methods	None selected -
	American Express
	Cash
	Check
	Credit Card
	Debit
	Discover
	DrChrono Payments
	Mastercard
	onpatient
	Other
	Patient Payments
	Square (Legacy)
	Square
	🗆 Visa

- Check the box next to the options you would like to show while you are posting patient payments. Once you are done, click on **Update Entire Profile**.
- Now, when patient payments are posted within your office, the payment types you selected will be the only ones that will show.

New Cash		×
Payment Date		
Appointment		~
Line Item		~
Provider		~
Payment Method	✓ - Select Type -	3
Туре	DrChrono Payments Cash	2
Notes	Check	
Amount	\$	
		Cancel

Here is a link to a video that will walk you through the steps to set up customized payment types in your office.