Getting Started with Patient Payments

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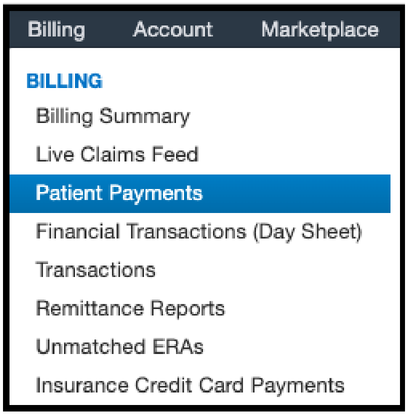
Within DrChrono, you have a couple of options to consider for collecting patient balances. They include in-house payments, the OnPatient patient portal, and integrated payment processors. This article will explain each so you can utilize the ones that fit into your workflow and optimize your office's efficiency.

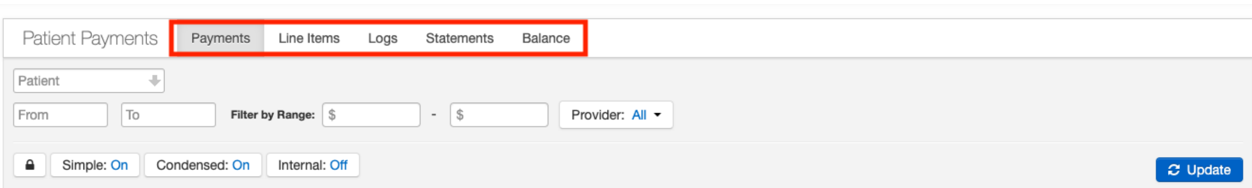
- View patients with an outstanding balance
- View patients with a balance within a certain dollar range
- View patients with unallocated payment
- View payment allocations
- Add new patient payments
- View the patient payment log
- View payments associated with appointments
- View statements and history of sent statements
- Generate and/or print receipts
- Export payment information to a spreadsheet

In-office payment processing

To access the Patient Payments tool, mouse over **Billing** in your navigation bar and select **Patient Payments**



Within the patient payments tool, there are five primary tabs: Payments, Line Items, Logs, Statements, and Balance. Click on the title below for additional information.



- **Payments** - This is where you can see a patient's appointment balance, payments made, unallocated payments, and current patient responsibility amounts.
- **Line Items** - This tab will allow you to see line item detail (Date of Service and CPT/HCPCS/Custom Code) as well as the allowed amount, patient responsibility, patient payments made, any pending insurance balance, and the patient's balance.
- **Logs** - This tab will allow you to see a history of payments posted, and moved on the patient's account. This

could be helpful in researching a payment or issue.

- **Statements** - This tab will allow you to see what statements have been generated and sent to the patient, as well as give you the option to view/print the statement.
- **Balance** - This tab will allow you to search for patients with an appointment balance/patient responsibility or unallocated amount between the parameters that you select.

OnPatient Payments

OnPatient offers the ability to send statements and collect payments. Below are some articles that cover your options for payments. See our article on OnPatient Basics for a quick look at the patient portal.

- DrChrono Payment processing in OnPatient
- Automatically Sending Statements to OnPatient
- Adding a Credit or Debit Card in OnPatient (must be connected to integrated payments to utilize)

Integrated Payments

DrChrono has an integrated payment processor that allows you to process credit cards to collect patient payments.

DrChrono Payments - It can be set up by going to **Account** > **Provider Settings** > **Patient Payments**.

- Getting set up with DrChrono Payments
- Processing patient payments on the web
- Processing patient payments on iPad