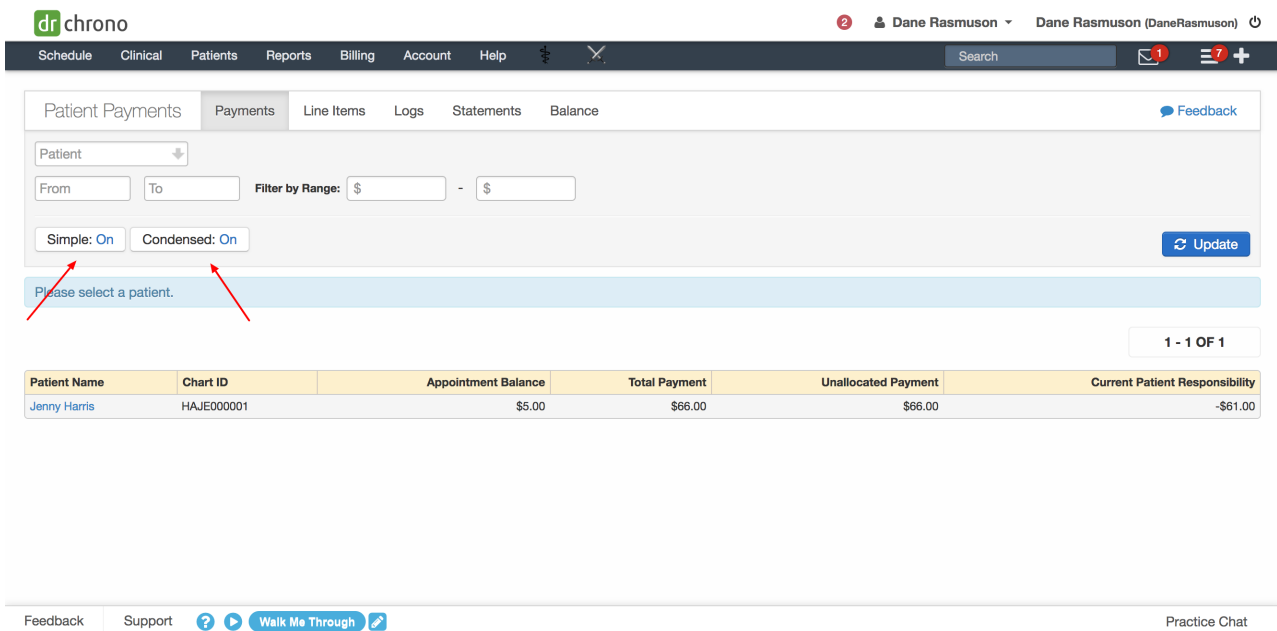
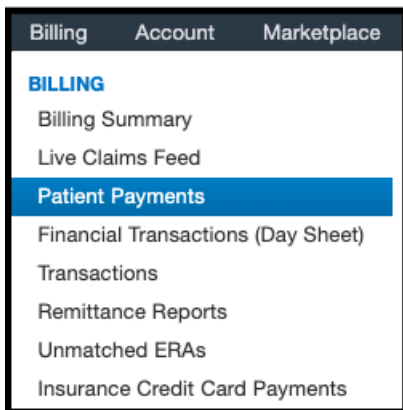


Posting a patient payment in the Patient Payments screen

07/24/2024 7:25 pm EDT

Posting a patient payment in DrChrono is very easy!

Please hover your cursor over the **Billing** tab and select **Patient Payments**

A screenshot of the DrChrono Patient Payments screen. The top navigation bar includes 'dr chrono', user 'Dane Rasmuson', and a search bar. The main navigation tabs are 'Schedule', 'Clinical', 'Patients', 'Reports', 'Billing', 'Account', and 'Help'. The 'Billing' tab is active, and the 'Patient Payments' sub-tab is selected. The screen shows a search box for 'Patient', 'From' and 'To' date fields, and a 'Filter by Range' section with dollar signs. Below these are 'Simple: On' and 'Condensed: On' toggle buttons, and an 'Update' button. A blue banner at the bottom of the search area says 'Please select a patient.' Below this is a table with one row of patient data. At the bottom of the screen are 'Feedback', 'Support', and 'Walk Me Through' buttons, and a 'Practice Chat' link.

Patient Name	Chart ID	Appointment Balance	Total Payment	Unallocated Payment	Current Patient Responsibility
Jenny Harris	HAJE000001	\$5.00	\$66.00	\$66.00	-\$61.00

By default, **Simple** and **Condensed** views will both be set to **On**. This provides you with the cleanest, most straightforward view possible. To view more in-depth information, switch those views to **Off**.

To get started, please select a patient by entering their name in the search box on the top left. You can also choose a date range, and/or filter using a balance (\$) filter. Please click the **Update** button to populate the information:

Patient Payments Payments Line Items Logs Statements Balance Feedback

From To Filter by Range: \$ - \$

Condensed: Off Update

	Total Paid	Allocated Payment	Unallocated Payment	Statement Balance	Total Balance
Jenny Harris	\$66.00	\$0.00	\$66.00	\$5.00	-\$61.00

Print/Export + Add

<input type="checkbox"/>	Posted Date	Payment Date	Appointment	Line Item	Payment Method	Notes	Amount	
<input type="checkbox"/>	Mar 20, 2018	Mar 20, 2018			Visa	ⓘ	\$2.00	<input type="button" value="Receipt"/>
<input type="checkbox"/>	Mar 20, 2018	Mar 20, 2018			onpatient	ⓘ	\$1.00	<input type="button" value="Receipt"/>
<input type="checkbox"/>	Mar 20, 2018	Mar 1, 2018			Check #12345	ⓘ	\$2.00	<input type="button" value="Receipt"/>
<input type="checkbox"/>	Mar 20, 2018	Mar 12, 2018			Cash	ⓘ	\$51.00	<input type="button" value="Receipt"/>
<input type="checkbox"/>	Mar 20, 2018	Mar 20, 2018			Cash	ⓘ	\$10.00	<input type="button" value="Receipt"/>

Legend: Unallocated | Fully Allocated

To add a payment, simply click the green + Add button:

Patient Payments Payments Line Items Logs Statements Balance Feedback

From To Filter by Range: \$ - \$

Condensed: Off Update

	Total Paid	Allocated Payment	Unallocated Payment	Statement Balance	Total Balance
Jenny Harris	\$66.00	\$0.00	\$66.00	\$5.00	-\$61.00

Print/Export + Add

<input checked="" type="checkbox"/>	Posted Date	Payment Date	Appointment	Line Item	Payment Method	Notes	Amount	
<input checked="" type="checkbox"/>	Mar 20, 2018	Mar 20, 2018			Visa	ⓘ	\$2.00	<input type="button" value="Receipt"/>
<input checked="" type="checkbox"/>	Mar 20, 2018	Mar 20, 2018			onpatient	ⓘ	\$1.00	<input type="button" value="Receipt"/>
<input checked="" type="checkbox"/>	Mar 20, 2018	Mar 1, 2018			Check #12345	ⓘ	\$2.00	<input type="button" value="Receipt"/>
<input checked="" type="checkbox"/>	Mar 20, 2018	Mar 12, 2018			Cash	ⓘ	\$51.00	<input type="button" value="Receipt"/>
<input checked="" type="checkbox"/>	Mar 20, 2018	Mar 20, 2018			Cash	ⓘ	\$10.00	<input type="button" value="Receipt"/>

Legend: Unallocated | Fully Allocated

From the popup menu titled **New Cash**, please fill out the information and click **Add**:

- **Payment Date** - The date you are posting the payment
- **Appointment** - You can use the drop-down to assign the payment to a specific appointment, or if you leave it blank the payment will be added to the patient's unallocated payment section to be used at a future time/future visit.
- **Line Item** - If you select a specific appointment to apply the payment, you can specify which line item (CPT/HCPCS/Custom Code) the payment should be applied to. Any charges on the specific appointment will show in the drop-down.
- **Provider** - this line designates the provider for the specific payment. It can be left blank if you prefer.
- **Payment Method** - this is to identify the type of payment (cash, check, etc)
- **Type** - this is to specify the type of payment.
 - Credit - a payment on the account
 - Refund - an amount is being refunded to the patient
 - Correction - used to correct a previous posting error

- Copay/Coinsurance - used to identify the payment as a copay/coinsurance
- Other - used for situations not specifically mentioned above
- **Notes** - This section is used to document check/money order numbers or any other details about the payment that could be useful later. The information listed here can come in handy if any research is needed in the future regarding the payment.

New Cash ✕

Payment Date

Appointment

Line Item

Provider

Payment Method

Type

Notes

Amount \$

You'll notice that we're currently utilizing the **Payments** tab of this screen. To export any info from the screen, please select which lines you'd like, or simply click the checkbox at the top to select all:

dr chrono Dane Rasmuson Dane Rasmuson (DaneRasmuson)

Schedule Clinical Patients Reports Billing Account Help Feedback

Patient Payments **Payments** Line Items Logs Statements Balance

From To Filter by Range: \$ - \$

Condensed: Off

	Total Paid	Allocated Payment	Unallocated Payment	Statement Balance	Total Balance
Jenny Harris	\$66.00	\$0.00	\$66.00	\$5.00	-\$61.00

Print/Export

Print Selected Receipts
 Export to CSV

	Payment Date	Appointment	Line Item	Payment Method	Notes	Amount	
<input checked="" type="checkbox"/>	Mar 20, 2018	Mar 20, 2018		Visa	ⓘ	\$2.00	<input type="button" value="Receipt"/>
<input checked="" type="checkbox"/>	Mar 20, 2018	Mar 20, 2018		onpatient	ⓘ	\$1.00	<input type="button" value="Receipt"/>
<input checked="" type="checkbox"/>	Mar 20, 2018	Mar 1, 2018		Check #12345	ⓘ	\$2.00	<input type="button" value="Receipt"/>
<input checked="" type="checkbox"/>	Mar 20, 2018	Mar 12, 2018		Cash	ⓘ	\$51.00	<input type="button" value="Receipt"/>
<input checked="" type="checkbox"/>	Mar 20, 2018	Mar 20, 2018		Cash	ⓘ	\$10.00	<input type="button" value="Receipt"/>

Legend: Unallocated | Fully Allocated |

Feedback Support Practice Chat

Clicking the option "Print Selected Receipts" will generate a printable pdf that can be given to patients as confirmation of their payment:

Dane Rasmuson

Payment Receipt

Payment Details

Patient	Amount Paid	Payment Type	Check #	Payment Date	Appointment Date
	\$2.00	Visa	N/A	Mar 20th, 2018	N/A
	\$1.00	onpatient	N/A	Mar 20th, 2018	N/A
	\$2.00	Check	12345	Mar 20th, 2018	N/A
	\$51.00	Cash	N/A	Mar 20th, 2018	N/A
	\$10.00	Cash	N/A	Mar 20th, 2018	N/A

Clicking **Export to CSV** will download the list directly in your Message Center.