

Text-to-Pay: How does it work?

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DrChrono has added an option where you can send a link to a patient's phone that they can then use to send you a payment/pay a copay, etc. This feature works **exclusively** with DrChrono Payments.

Here's how it works:

- From the patient's appointment window, select **Save & Pay**.

The screenshot shows the DrChrono appointment interface. At the top, there are tabs for Appointment, Billing, Eligibility, Vitals, Growthcharts, Flags, Log Comm., Revisions, Custom Data, and MU Helper. Below the tabs, there are radio buttons for 'Type' (Appointment, Video Visit) and checkboxes for 'Walk-in', 'Transition of Care', and 'Referral'. A warning banner states: 'WARNING: This patient is pre-populated sample data. Patient Statement Balance: \$3203.38 Generate Statement Primary Insurance: Aetna [60054]'. The main form contains fields for Provider (Doctor Doctor), Supervising (- If different to provider -), Patient (Marc (Demo) Alexander - 05/12/18), Reason, Scheduled (12/21/2023 Time 12:00PM), Duration (90 minutes), Notes (This is a demo appointment), Consent Forms (HIPAA Data Use Agreement (default)), Billing (Doctor Doctor), Office (Primary Office), Profile, Eligibility Profile, Exam (Exam 2), Color (green), Status (17h 56m), and buttons for View Clinical Note and View All Appointments. At the bottom, there are checkboxes for Recurring Appointment, Arrange a Follow-up Reminder, and View Active Reminders. A red arrow points to the 'Save & Pay' button in the bottom right corner.

- Recurring Appointment A scheduled appointment cannot be converted to a recurring series.
- Arrange a Follow-up Reminder
- View Active Reminders:

Delete Save **Save & Pay**

All patient data listed in this article is sample data. This is not a real person or real patient data.

- A new window will pop up and give you two options:
 - Text to Pay
 - Pay Now

**** Please note, the Text to Pay option will only work if you are utilizing DrChrono Payments ****

Choose Payment Method

Payment Method

- Text to Pay
- Pay Now

Cancel Next

Text to Pay

- If you select **Text to Pay**, you will see the following window. It will allow you to select a phone number on file in the patient's chart, or enter a different phone number. It will also ask for an amount to request from the patient.
 - Once both fields are filled in, select **Send**.

Text to Pay ×

Phone Number:

The number must be in the format +12345678901

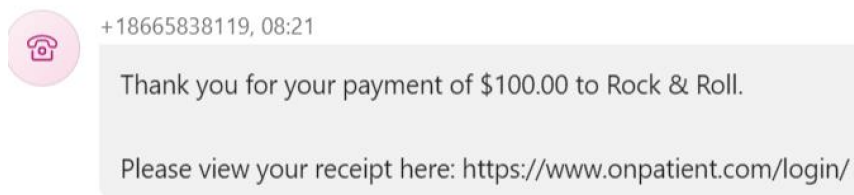
Amount:

Please note: the amount can be any dollar/cents amount. Enter the number with no dollar sign (\$). If your decimal (.) isn't recognized or responds, try the one on your keyboard, just above the space bar.

- The phone number listed will receive a text message requesting payment of the dollar amount you have listed in the 2nd row above. The text will look like this. The patient can click on the link to enter their payment information.



- Once they complete their portion, they will receive a confirmation text that looks like this. The payment will automatically be reflected in their chart.



Pay Now

- If you select **Pay Now**, you will see the following window.
 - This will allow you to process a cash, check, money order, or credit card payment, depending on your

office procedures.

- As in the Text-to-Pay option, as soon as the payment is entered and processed, it will be posted to the patient's appointment.

New Cash ×

Payment Date

Appointment

Line Item

Provider

Payment Method

Type

Notes

Amount \$

Code	Applied	Balance	Payment Type
			<input type="text" value="Credit"/>