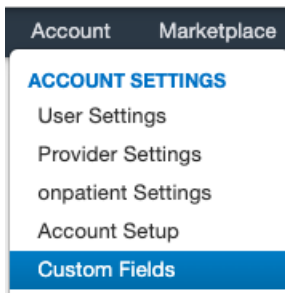


How to create a Custom Patient Payment Type

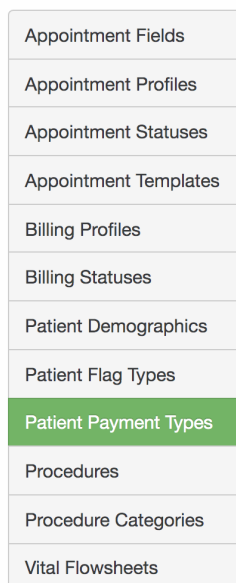
07/24/2024 5:05 pm EDT

If you would like to create a custom patient payment type such as a coupon, flex spending card, etc, you can do so by following the steps given below.

1. Go to **Account > Custom Fields**.



2. Click on **Patient Payment Types** on the left of the screen.



3. Click **Add New Type**

Appointment Fields

Appointment Profiles

Appointment Statuses

Appointment Templates

Billing Profiles

Billing Statuses

Patient Demographics

Patient Flag Types

Patient Payment Types

Procedures

Procedure Categories

Vital Flowsheets

Custom Patient Payment Types

+ Add New Type

Reserved Payment Types: American Express, Amex, CHCK, CRDT, Cash, Check, Credit Card, DBIT, DISC, Debit, Discover, MSTR, Mastercard, ONPT, OTHR, Other, PTPA, Patient Payments, SQR1, SQRE, Square, Square (Legacy), Visa, onpatient.

Name	Description	Appointments	Updated	Created	
Care Credit		0	Jan 8, 2020	Jan 8, 2020	Edit Archive

Archived

Name	Description	Archived	Created	
Annual Fee		Sep 10, 2020	Aug 9, 2019	Unarchive

4. Select a name and hit Save

Create Custom Patient Payment Type

Name:

Description:

[Save](#) [Cancel](#)

Once created, you can select this as a payment type while posting patient payments.

From the appointment window:

1. Go into the **Appointment** and click the **Billing** tab. Select the **+** to post payment.

Schedule Appointment

Appointment **Billing** Eligibility Vitals Growthcharts Flags Log Comm. Revisions Custom Data MU Helper

Patient SuperBill Clinical Note Billing Details Other Forms

Billing Status [Dropdown] **HCFA Box 10 - Is patient's condition related to:**

ICD Version: ICD-10 [Dropdown]

Patient Payment: \$ 0 [Input] + [Button] ←

Pre Authorization Approval: FAC001 [Input]

Referral #: [Input]

Payment Profile: Cash [Dropdown]

Billing Profile: New Pati [Dropdown] + [Button]

Billing Pick List: Choose Codes from Pick List [Button]

Diagnosis Pick List: Choose Codes from Pt Problems [Button]

Employment: No [Dropdown]

Auto Accident: No [Dropdown]

Other Accident: No [Dropdown]

Onset Date Type: Onset of Current Symptoms o [Dropdown]

Onset Date: [Input]

Other Date Type: - Other Date Type - [Dropdown]

Other Date: [Input]

ICD-10 Codes Find Diagnosis codes [Dropdown]

#	Code	Description
---	------	-------------

ICD-9 Codes to Convert Find Diagnosis codes [Dropdown]

#	Code	Description
---	------	-------------

CPT Codes Find CPT Procedure codes [Dropdown]

Code	Description	Price (\$)
1 99203	OFFICE/OUTPATIENT VISIT NEW	150.00

Modifiers: [Dropdown] [Dropdown] [Dropdown] [Dropdown]

Quantity/Minutes: 1.00 [Input]

2. Select the Custom Payment Option.

Schedule Appointment

Appointment **Billing** Eligibility Vitals Growthchart

Billing Status [Dropdown]

ICD Version: ICD-10 [Dropdown]

Patient Payment: \$ 0 [Input] + [Button]

Pre Authorization Approval: FAC001 [Input]

Referral #: [Input]

Payment Profile: Cash [Dropdown]

Billing Profile: New Pati [Dropdown] + [Button]

Billing Pick List: Choose Codes from Pick List [Button]

Diagnosis Pick List: Choose Codes from Pt Problems [Button]

ICD-10 Codes Find Diagnosis codes [Dropdown]

#	Code	Description
---	------	-------------

ICD-9 Codes to Convert Find Diagnosis codes [Dropdown]

#	Code	Description
---	------	-------------

Quantity/Minutes: 1.00 [Input]

New Cash

Payment Date: 09/10/2020 [Input]

Appointment: 9/10/2020 02:00PM (\$150.00) [Dropdown]

Line Item: -Auto Allocate- [Dropdown]

Provider: Martvna Somerville [Dropdown]

Payment Method: **Cash** [Dropdown]

Type: [Dropdown]

Notes: [Input]

Amount: [Input]

Code	Applied	Payment Type
99203	\$	credit

From the patient payment window:

1. Navigate to Billing > Patient Payments

BILLING

Billing Summary

Live Claims Feed

Patient Payments

Day Sheet

Transactions

Remittance Reports

Unmatched ERAs

Insurance Credit Card Payments

Accounts Receivable

Patient Statements

Product/Procedure

Patient Balance Ledger

Fee Schedule

Underpaid Items

Adjustment Master

Sales Tax

Billing Log

2. Ensure you are on the Payment tab, and then select your patient

The screenshot shows the 'Patient Payments' interface. At the top, there are tabs: 'Patient Payments', 'Payments' (highlighted with a blue box), 'Line Items', 'Logs', 'Statements', and 'Balance'. Below the tabs is a 'Patient' dropdown menu. Underneath are 'From' and 'To' input fields, followed by a 'Filter by Range:' section with two dollar sign (\$) input fields and a minus sign (-). To the right is a 'Provider: All' dropdown menu. At the bottom, there are three toggle buttons: 'Simple: On', 'Condensed: On', and 'Internal: Off'.

3. Select + Add

The screenshot shows the 'Patient Payments' interface with the 'Payments' tab selected. Below the filter options, there is a summary table with two columns: 'Total Paid' and 'Allocated Pa'. The 'Total Paid' value is \$175.00. Below this is a 'Print/Export' dropdown menu and a green '+ Add' button (highlighted with a blue box). At the bottom, there is a table with the following data:

#	Unallocated	Posted Date	Payment Date
1	\$175.00	Apr 14, 2022	Apr 14, 2022

4. Your newly created custom patient payment type will be listed under the payment method.

The image shows a web form titled "New Cash" with a close button (X) in the top right corner. The form contains several input fields: "Payment Date" (text), "Appointment" (dropdown), "Line Item" (dropdown with "-No Line Item-" selected), and "Provider" (dropdown). The "Payment Method" dropdown is open, showing a list of options: "Select Type -", "DrChrono Payments", "Cash", "Check", "Debit", "Credit Card", "American Express", "Visa", "Mastercard", "Discover", "onpatient", "Other", "Credit from previous system", and "Coupon". The "Coupon" option is highlighted with a blue border. At the bottom right of the form are "Cancel" and "Add" buttons.

Payment Date	<input type="text"/>
Appointment	<input type="text"/>
Line Item	-No Line Item-
Provider	<input type="text"/>
Payment Method	▼ - Select Type - DrChrono Payments Cash Check Debit Credit Card American Express Visa Mastercard Discover onpatient Other Credit from previous system Coupon
Type	
Notes	
Amount	

Cancel Add