INTERNAL: How do I migrate a user to the "new" patient payments 2.0?

07/24/2024 5:50 pm EDT

***** As of February 2023 - please submit a JIRA to migrate a client from the previous patient payment system to patient payments 2.0. It needs to be managed from the backend. Thank you!! *****

May 2024 update - all clients should now be on patient payments 2.0. The option under Billing has been updated to "Patient Payments" - this is v2 as a DrC employee would recognize. All clients are on the new version, thus the update to the name.

Introduction: The "New" Patient Payments System

The new patient payments introduce better accounting practices and highly requested features that overall improve customer experience in handling non-insurance payments. Most notably, unallocated payments are now tracked when allocated. DrChrono Payments (f.k.a. PaySimple) will only work when customers are on Patient Payments 2.0.

The new patient payments system applies on a practice-group level. Either all members of the practice will be migrated to the new patient payments system or no members of a practice can be added to the new system.

All new practice groups created after November 16th, 2017 will automatically be placed on the new patient payments system.

Upon initiating the migration process, a backend task is queued to migrate the practice the same night. This occurs nightly at 8:00 PM PST. Afterward, this migration process can take several hours for larger customers. **During this time, the customer should not record payments and/or use the 'auto-allocate' feature** to minimize the risk of balancing issues in the account. Stripe payments will not be affected. If you are migrating a large group, it is safest to initiate the migration on Friday or Saturday to minimize downtime.

Checking if a customer is on the new payment system

Visit the CRM page for the customer. In the 'Features' section, there will be an indicator for patient payments. One of the five following options will be displayed:

1. The customer is currently a user of the new patient payments system

2. The customer is not a user of the new patient payments system

3. The customer is in the process of migrating to the new patient payments system

4. "In Progress": Visible during the migration process while the migration is occurring nightly.

5. "Error": The customer must get in contact with a developer (rare).

Migrating a customer to the new payment system

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STEP 1: Obtain consent from the practice to migrate the practice to the new patient payments system.

*Warning: Once a single user begins the migration process to the new patient payments system, **the entire practice will also be migrated**. It is not possible to have a set of users of a practice on the new patient payments system and another set of users on the old patient payments system. As mentioned earlier, this change occurs at the practice group level.*

STEP 2: Visit a doctor's CRM page. In the 'Features' section, select the 'Migrate' button to begin migration.

*WARNING: This will migrate the entire practice group to the new patient payments. This change is **irreversible**.*

STEP 3: If you are ready to migrate the practice, click 'OK' on the warning that appears.
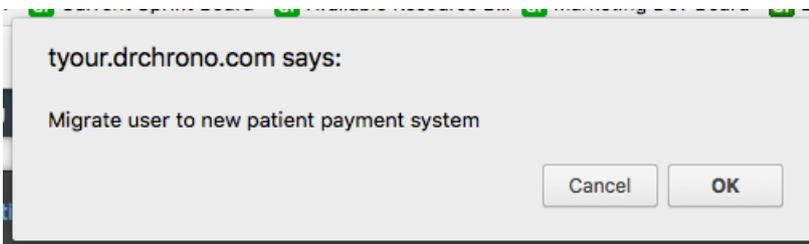
*WARNING: This will migrate the entire practice group to the new patient payments. This change is**irreversible**.*

WARNING: This process begins nightly at 8:00 PM PST. During this time, practices should not take copays or use the 'auto-allocate' feature.

STEP 4: The icon for 'Patient Payment' will turn to a blue 'Queued' indicator. Please wait 1-2 business days for the migration to complete.

Features: **Queued** Patient Payment

STEP 5: When the migration is complete, this indicator will be replaced with a green 'Active' indicator, alongside the date the migration was completed.

Features: **Active** Patient Payment [Jan. 24, 2018]

Viewing all queued and completed migrations

To view all queued and completed migrations, visit Quick View under Swords > Quick View > Migrations.

Claims						
Claim Status Inquiry	Your activity of quick view is being recorded.					
EDI Submission	All ⬍ 🔍 Search					← PAGE **2** →
EDI Received	**ID**	**Name**	**Practice Group**	**Created at**	**Created by**	**Status**	**Completed On**
Providers	1802	patient_payment	Obisesan LLC (225382)	Jan 29, 2018 1:20:51 PM	othomas	Initiated	
Unmatched ERAs	1800	patient_payment	(239530)	Jan 29, 2018 12:49:18 PM		Initiated	
Real Time Eligibility	1798	patient_payment	(239528)	Jan 29, 2018 12:49:04 PM		Initiated	
Search for References	1796	patient_payment	(239526)	Jan 29, 2018 12:24:21 PM		Initiated	
Search Patient in IXT	1794	patient_payment	(239524)	Jan 29, 2018 12:11:48 PM		Initiated	
Insurance Payer	1792	patient_payment	(239522)	Jan 29, 2018 11:10:34 AM		Initiated	
CQM ValueSet	1790	patient_payment	(239520)	Jan 29, 2018 11:01:16 AM		Initiated	
Demographics Zip Codes	1788	patient_payment	(239518)	Jan 29, 2018 10:40:41 AM		Initiated	
Migrations	1786	patient_payment	(239516)	Jan 29, 2018 10:30:19 AM		Initiated	
	1784	patient_payment	(239514)	Jan 29, 2018 10:19:13 AM		Initiated	
	1782	patient_payment	(239512)	Jan 29, 2018 10:02:28 AM		Initiated	
	1780	patient_payment	(239510)	Jan 29, 2018 10:01:18 AM		Initiated	
	1778	patient_payment	(239508)	Jan 29, 2018 10:00:21 AM		Initiated	
	1776	patient_payment	(239506)	Jan 29, 2018 9:59:25 AM		Initiated	
	1774	patient_payment	(239504)	Jan 29, 2018 9:54:26 AM		Initiated	
	1772	patient_payment	(239502)	Jan 29, 2018 9:53:37 AM		Initiated	
	1770	patient_payment	(239500)	Jan 29, 2018 9:52:39 AM		Initiated	
	1768	patient_payment	(239498)	Jan 29, 2018 9:51:21 AM		Initiated	
	1766	patient_payment	(239496)	Jan 29, 2018 9:31:19 AM		Initiated	
	1764	patient_payment	(239494)	Jan 29, 2018 9:00:43 AM		Initiated	