

# 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:

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

The screenshot shows the DrChrono appointment window. At the top, there are tabs for Appointment, Billing, Eligibility, Vitals, Growthcharts, Flags, Log Comm., Revisions, Custom Data, and MU Helper. The 'Appointment' tab is active. Below the tabs, there are radio buttons for 'Type' with options: Appointment (selected), Video Visit, Walk-in, Transition of Care, and Referral. A warning message states: 'WARNING: This patient is pre-populated sample data.' To the right of the warning, it shows 'Patient Statement Balance: \$3203.38' with a 'Generate Statement' link, and 'Primary Insurance: Aetna [60054]'. The main form area is divided into two columns. The left column contains fields for Provider (Doctor Doctor), Supervising (- If different to provider -), Patient (Marc (Demo) Alexander - 05/12/19...), Reason (empty), Scheduled (12/21/2023, Time 12:00PM), Duration (90 minutes, Allow overlapping checked), Notes (This is a demo appointment), and Consent Forms (HIPAA Data Use Agreement (default)). The right column contains fields for Billing (Doctor Doctor), Office (Primary Office), Profile (-----), Eligibility Profile (-----), Exam (Exam 2), Color (green), Status (17h 56m), and a 'View Clinical Note' button. At the bottom of the form, there are three buttons: Delete, Save, and Save & Pay. A red arrow points to the 'Save & Pay' button. Below the buttons, there are checkboxes for 'Recurring Appointment', 'Arrange a Follow-up Reminder', and 'View Active Reminders'.

2. A new window will pop up and give you two options:

- a. Text to Pay
- b. 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

1. 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.
2. Once both fields are filled in, select **Send**.

**Text to Pay** X

**Phone Number:**

Select or enter phone number

The number must be in the format +12345678901

**Amount:**

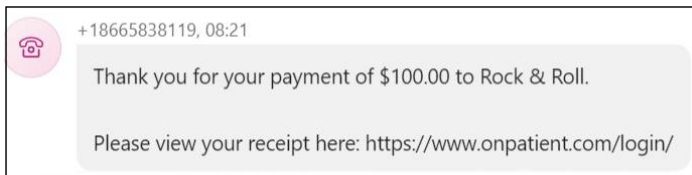
Cancel Send

**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.

1. 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 press on the link to enter their payment information.



2. 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.

1. This will allow you to process a cash, check, money order, or credit card payment, depending on your office procedures.
2. 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 x

Payment Date

Appointment

Line Item

Provider

Payment Method

Type

Notes

Amount \$

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