

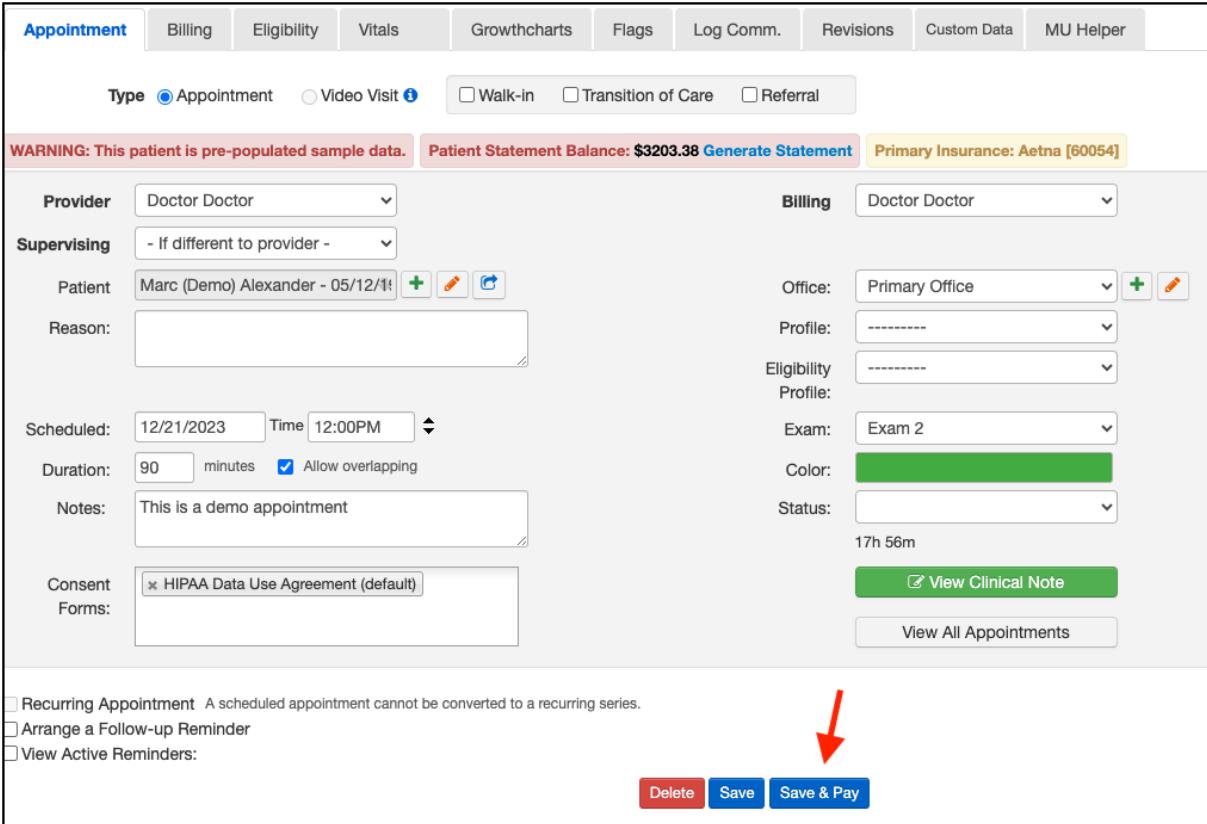
# Text-to-Pay: How does it work?

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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/make a deposit, 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 booking interface. The top navigation bar includes tabs for Appointment, Billing, Eligibility, Vitals, Growthcharts, Flags, Log Comm., Revisions, Custom Data, and MU Helper. The 'Appointment' tab is selected. Below the tabs, there are buttons for Type (Appointment, Video Visit, Walk-in, Transition of Care, Referral), and a warning message: 'WARNING: This patient is pre-populated sample data.' The patient statement balance is listed as '\$3203.38' with a 'Generate Statement' button. The primary insurance is 'Aetna [60054]'. The appointment details include: Provider (Doctor Doctor), Supervising (If different to provider), Patient (Marc (Demo) Alexander - 05/12/19), Reason (empty), Scheduled (12/21/2023, 12:00PM), Duration (90 minutes, Allow overlapping checked), Notes (This is a demo appointment), Consent Forms (HIPAA Data Use Agreement (default)), Billing (Doctor Doctor), Office (Primary Office), Profile (empty), Eligibility Profile (empty), Exam (Exam 2), Color (green bar), Status (empty), and a status message '17h 56m'. Below the appointment details, there are checkboxes for Recurring Appointment, Arrange a Follow-up Reminder, and View Active Reminders. At the bottom right, there are buttons for Delete, Save, and Save & Pay. A red arrow points to the 'Save & Pay' button.

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 that will receive the text and payment link. It will also ask for an amount to request from the patient.
2. Once both fields are filled in, select **Send**.

**Text to Pay**

**Phone Number:**  
Select or enter phone number  
The number must be in the format +12345678901

**Amount:**

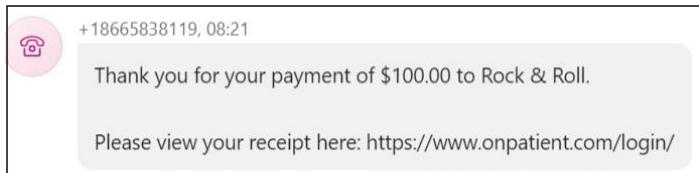
**Cancel** **Send**

**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 right side of the space bar.

1. The phone number listed will receive a text message requesting payment of the dollar amount you have listed in the second row above. The text will look like this. The patient can press 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	<input type="text"/>
Appointment	<input type="text"/>
Line Item	<input type="text"/>
Provider	<input type="text"/>
Payment Method	<input type="text"/> DrChrono Payments
Type	<input type="text"/>
Notes	<input type="text"/>
Amount	\$ <input type="text"/>

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