

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:

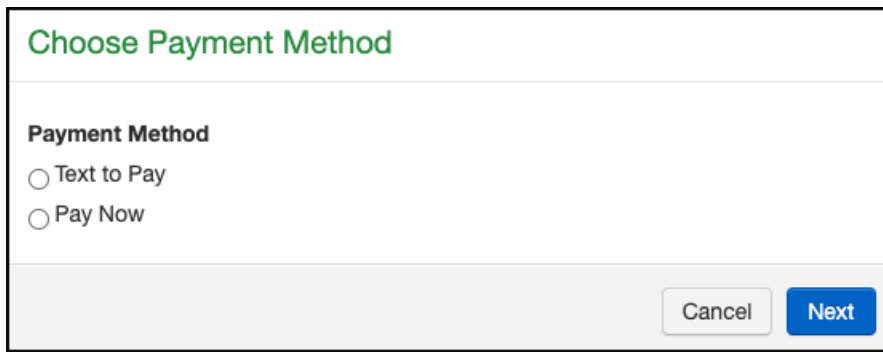
1. From the patient's appointment window, select **Save & Pay**.

The screenshot shows the DrChrono appointment window. At the top, there are tabs: Appointment (selected), Billing, Eligibility, Vitals, Growthcharts, Flags, Log Comm., Revisions, Custom Data, and MU Helper. Below the tabs, there are radio buttons for 'Type': 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' 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 - 05/12/14), Reason (empty), Scheduled (12/21/2023, 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 buttons for View Clinical Note and View All Appointments. At the bottom of the form, there are checkboxes for Recurring Appointment, Arrange a Follow-up Reminder, and View Active Reminders. A red arrow points to the 'Save & Pay' button, which is located next to 'Save' and 'Delete' buttons.

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

- a. Text to Pay
- b. Pay Now

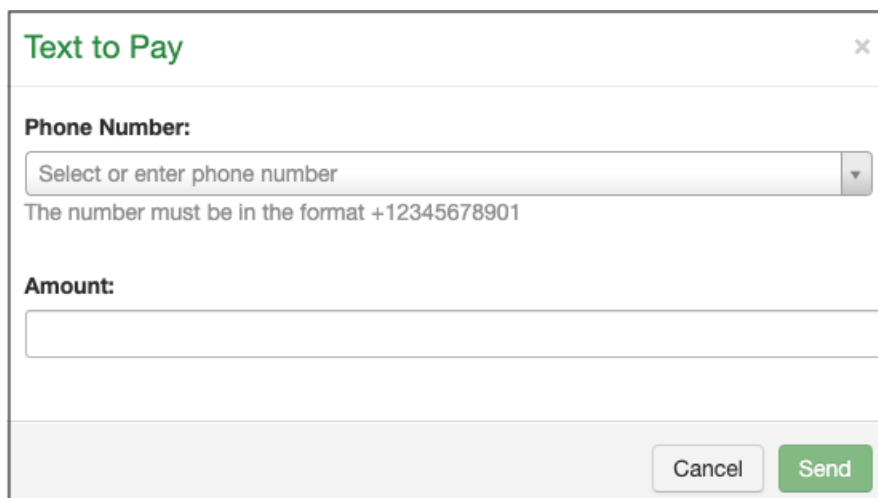
**** Please note, the Text to Pay option will only work if you are utilizing DrChrono Payments ****



A dialog box titled "Choose Payment Method" in green text. Below the title, under the heading "Payment Method", there are two radio button options: "Text to Pay" and "Pay Now". At the bottom right, there are two buttons: a light gray "Cancel" button and a blue "Next" button.

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**.



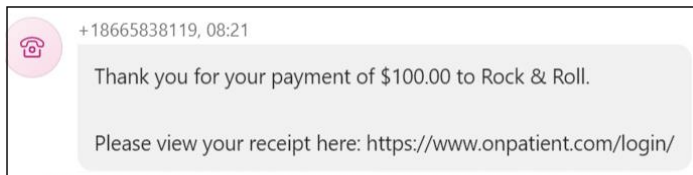
A dialog box titled "Text to Pay" in green text, with a close button (X) in the top right corner. Below the title, under the heading "Phone Number:", there is a dropdown menu with the placeholder text "Select or enter phone number". Below the dropdown, a note states: "The number must be in the format +12345678901". Under the heading "Amount:", there is a text input field. At the bottom right, there are two buttons: a light gray "Cancel" button and a green "Send" button.

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.



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

Payment Date

Appointment

▼

Line Item

▼

Provider

▼

Payment Method

DrChrono Payments

▼

Type

▼

Notes

Amount

\$

Code	Applied	Balance	Payment Type
			Credit ▼

Cancel

Pay with card