

Patient Payment Plans: Setting up your DrChrono account to accept patient payment plans

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To set up payment plans for your patients within your DrChrono account, you first need to decide on a few parameters, including:

- The minimum monthly payment amount your office will accept.
- The minimum patient balance your office will allow to be placed on a payment plan.
- The minimum and maximum number of months your office will allow payments to be stretched over.

**** Please note that processing patient payments through payment plans *requires* that you are utilizing DrChrono Payments ****

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Initial Setup

To set these for your office, follow the steps below:

1. Navigate to **Account > Provider Settings > Patient Payments**
2. Under the header **Payment Plan Settings**, you will see the following options:

Payment Plan Settings

Minimum Payment Amount	<input type="text"/>	Minimum payment amount that is allowed for a payment plan.
Onpatient Directed Payment Plan	<input type="checkbox"/>	Allow patient directed payment plans through OnPatient.
Minimum Patient Balance	<input type="text"/>	Minimum patient balance amount allowed for patient directed payment plans
Maximum Patient Balance	<input type="text"/>	Maximum patient balance amount allowed for patient directed payment plans
Minimum Monthly Installments	<input type="text"/>	Minimum amount of months
Maximum Monthly Installments	<input type="text"/>	Maximum amount of months
Recurring Payment	<input type="checkbox"/>	Allow recurring payments automatically for patients who have saved cards on file

[Update Entire Profile](#)

Minimum Payment Amount - this is the minimum amount you will accept as a monthly payment

OnPatient Directed Payment Plan - enabling this click box will allow your patients to set up their own payment

plans through their OnPatient account. They would be subject to the parameters you set in your account settings.

Minimum Patient Balance - this is the minimum amount you will allow patients to set up on a payment plan through their OnPatient account.

Maximum Patient Balance - this is the maximum amount you will allow patients to set up on a payment plan through their OnPatient account.

Minimum Monthly Installments - this is the minimum number of months allowed for a payment plan

Maximum Monthly Installments - this is the maximum number of months allowed for a payment plan.

Recurring Payment - this will allow patients with a credit card on file to set a recurring charge to satisfy their monthly payment plan amount.

3. Once you have made your selections, press **Update Entire Profile**.



Minimum Monthly Amount

DrChrono's Payment Plans allow the office administrator to set a minimum payment amount. If a member of the office attempts to set a payment plan where the monthly payment is below the minimum payment set by the office administrator, they will receive this error message:

Create Payment Plan ✕

- Plan amount must be set to greater than or equal to minimum payment amount allowed setting (\$100.00).

Payment Option Patient Total Balance
 Selected Appointments

Appointment

Total Balance of Selected Appointments

Payment Plan Amount \$

Duration

Monthly Payment

First Payment Date

Enable Auto Payment

Close
Create Payment Plan

To set up the payment plan, either the minimum payment must be increased to the allowed setting, or the office administrator must update the setting to allow the payment plan to be saved.

Flag on Patient Appointment

Once your patient is placed on a monthly payment plan, the system will automatically add a flag to their account to alert your staff that the payment plan exists.

It will be in the usual places where you expect to see patient flags, including the live claims feed, the demographic section of their chart, and in the appointment window.

In the demographic section of the patient's chart:

Demographics

✓ Sufficient patient demographics to bill insurance.

Demographics	Insurances	Authorizations	Patient Flags
Balance	DrChrono Payments		<div style="border: 1px solid #007bff; padding: 2px 10px; display: inline-block;">Payments</div>

In the appointment window:

Primary Insurance: Cigna [62308] Patient Payment Plan: On Patient Payment Plan

Billing: - If different to provider -

Office: Primary Office +

Profile: -----

Eligibility Profile: -----

Exam: Exam 1

Color: [Color Selection]

Status: [Status Selection]

View Clinical Note

View All Appointments

In the Live Claims Feed:

Primary Insurer: (62308) Cigna Patient Payment Plan: On Patient Payment Plan

Line Item	NDC Code
[Dropdown]	Add NDC code [Dropdown]

Late Payments

If you have patients on payment plans who are not on a recurring payment via a credit card on file, there is an easy way to see if any payment is overdue.

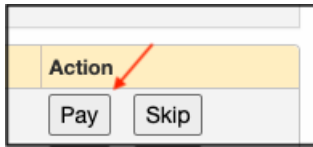
1. Navigate to Report > Patient Payment Plan Report
2. Press on the up/down arrows next to the Date of Next Payment column. This will sort the upcoming payments for all patients by the due date.

Patient Payment Plan

From [] To [] Show only Active Plans Show only Late Plans

Patient	Plan Creation Date	Date of Last Payment	Date of Next Payment	Next Payment Amount	Remaining Balance	Original Total	Action
Sample Sam	12/11/2023	N/A	N/A	\$0	\$25.00	\$100.00	Pay Skip
Lucas (Demo) Harris Sr.	12/21/2023	N/A	N/A	\$0	\$300.00	\$300.00	Pay Skip

3. If you would like to process the payment, you can do so right from this screen by pressing **Pay** under the Action column.

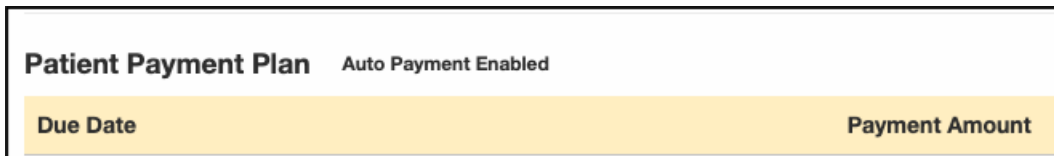
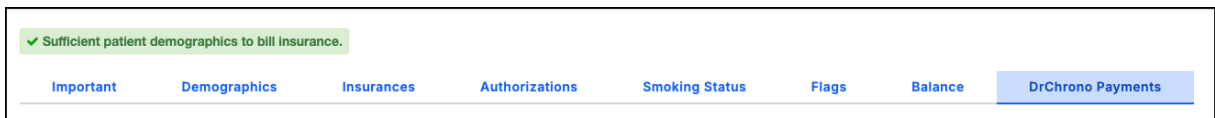


Please note that this will only work if there is a saved credit card on file, or the patient's card is present.

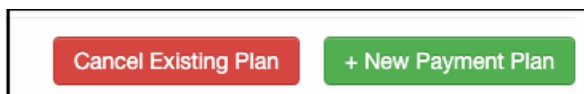
Canceling an existing payment plan

If you need to cancel an existing payment plan, you can easily do so by following the instructions below:

1. Navigate to the **patient's chart > DrChrono Payments > Patient Payment Plan** header



2. Through the button on the right-hand side, you can cancel the existing payment plan.



Note: Once you click the "Cancel Existing Plan", the plan will immediately be removed from the patient's account.