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.

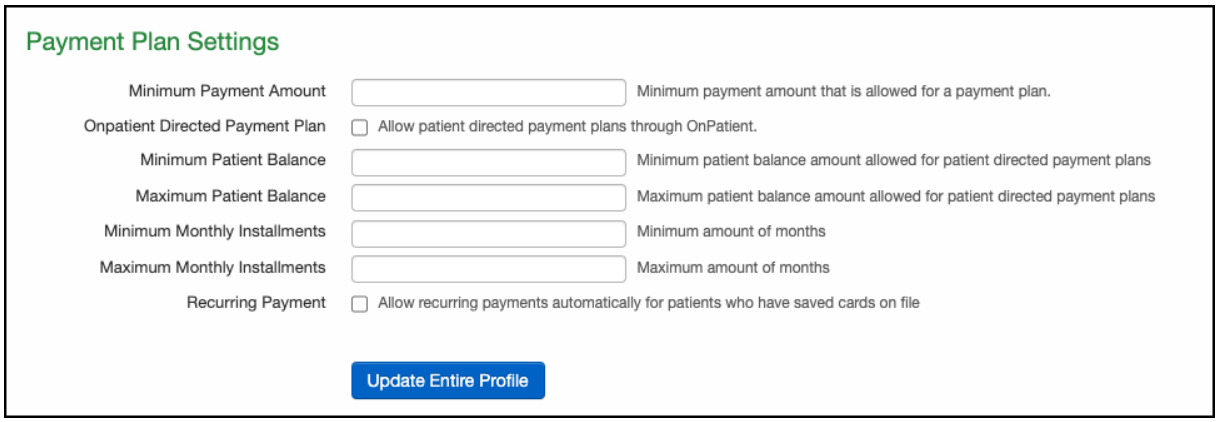
> *** Please note that processing patient payments through payment plans requires that you are utilizing DrChrono Payments ****

Initial Setup | Minimum Monthly Amount | Account Flag | Late Payments | Cancel a Payment Plan

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:



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

OnPatient Directed Payment Plan - enabling this checkbox 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.

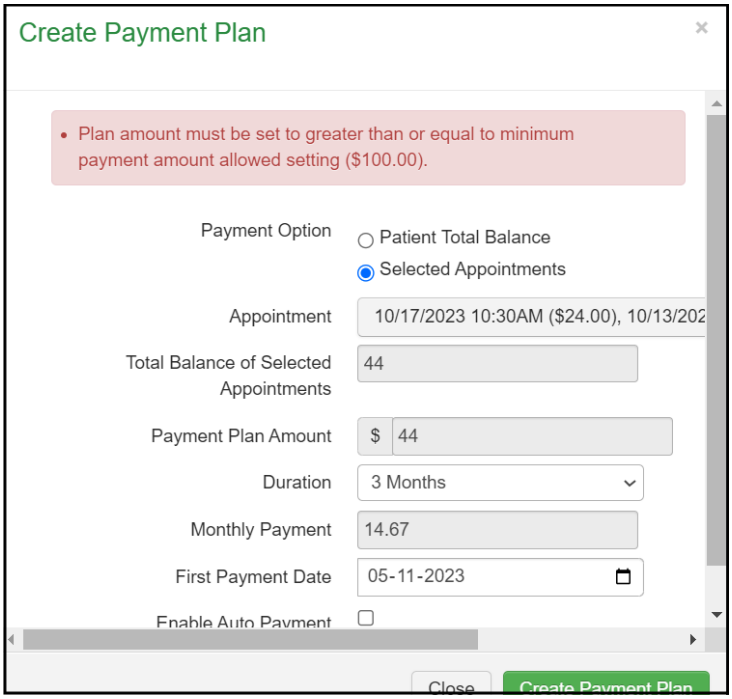
Recurring Payment - this will allow patients with a credit card on file to set a recurring charge to satisfy their monthly payment plan amount.

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:



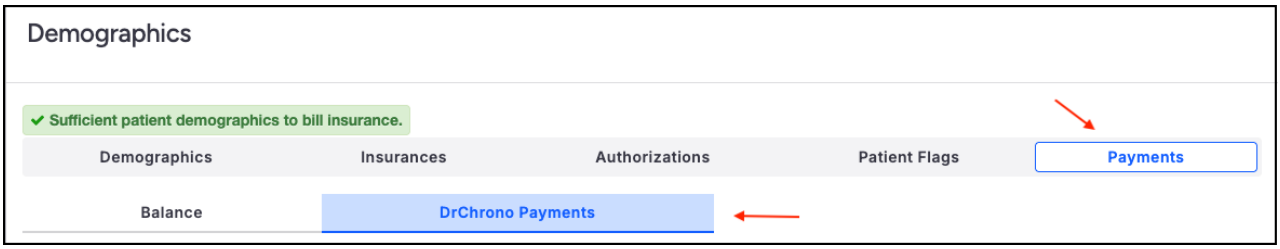
To set up the payment plan, either the minimum payment must be increased to the allowed setting, or the office administrator must update the setting to allow the payment plan to be saved.

Flag on Patient Appointment

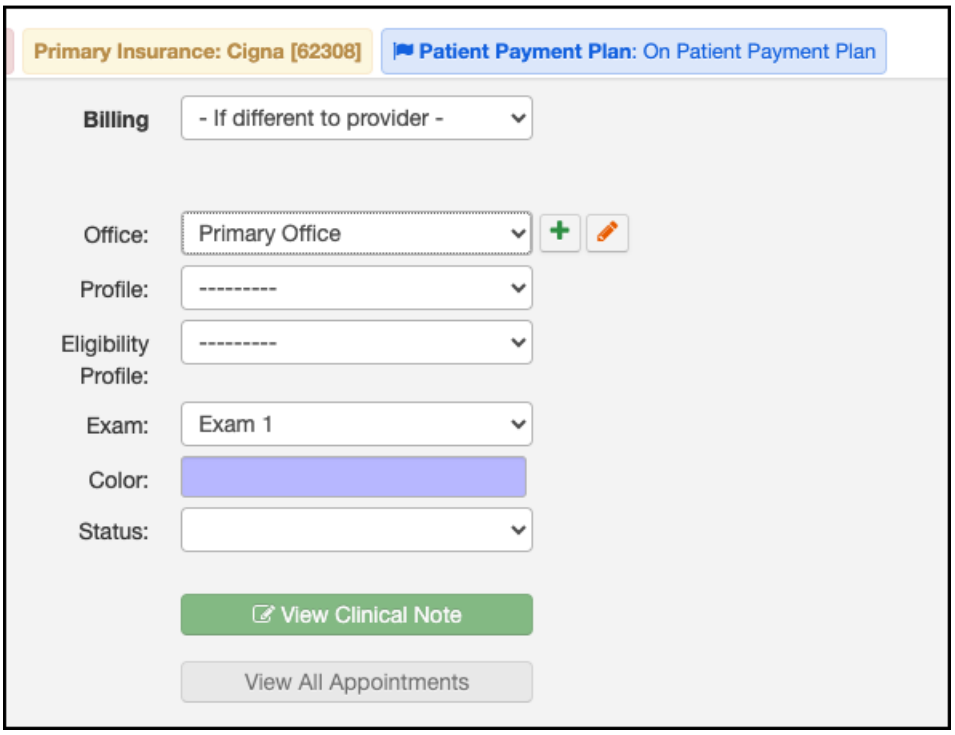
Once your patient is placed on a monthly payment plan, the system will automatically add a flag to their account to alert your staff that the payment plan exists.

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.

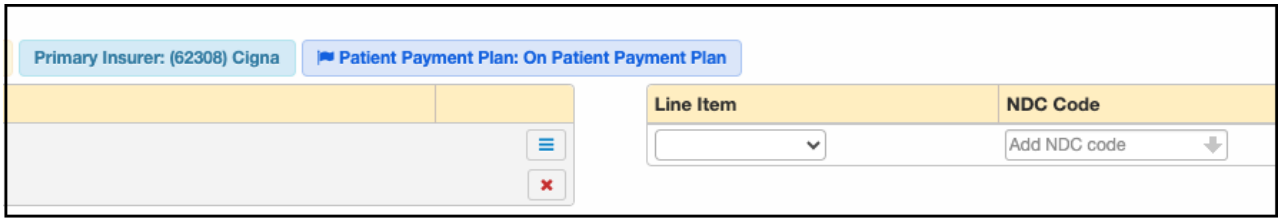
In the demographic section of the patient's chart:



In the appointment window:



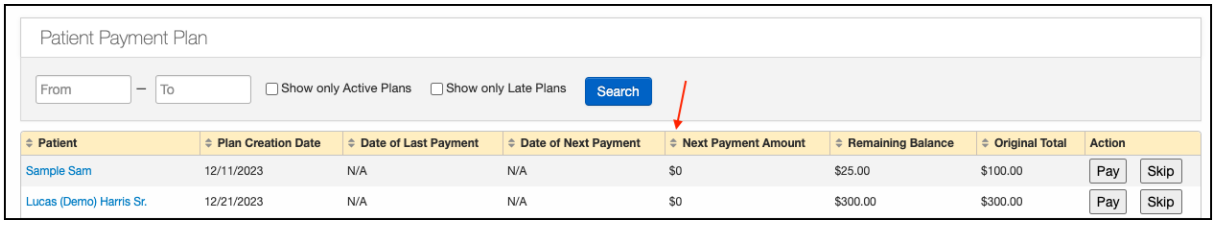
In the Live Claims Feed:



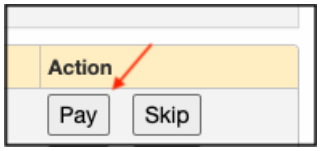
Late Payments

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 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.



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

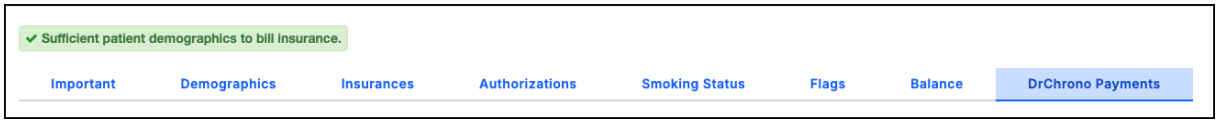


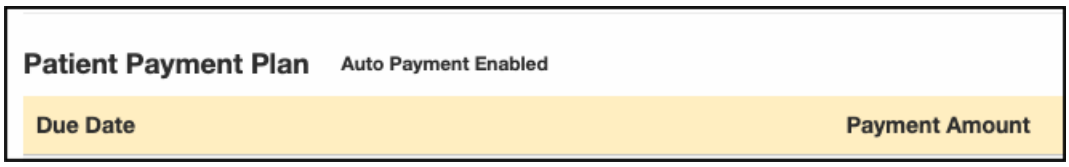
Please note that this will only work if there is a saved credit card on file, or the patient's card is present.

Canceling an existing payment plan

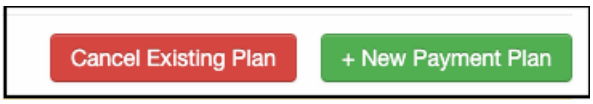
If you need to cancel an existing payment plan, you can easily do so by following the instructions below:

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.



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