

Customizing your available payment types

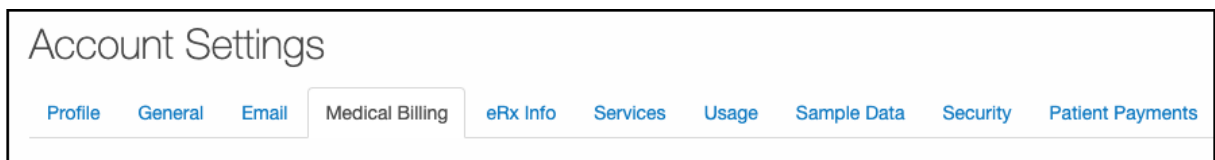
Last modified on 02/27/2025 8:54 am EST

You can customize the payment types options available when your office posts patient payments. For example, if your office does not accept checks, you can remove that option from the list of available payment types so it cannot be selected.

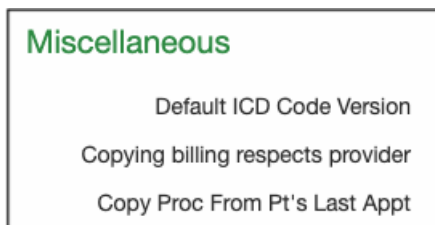
If you would like to utilize this feature, please reach out to your account manager, or [support](#) and ask for the feature to be turned on for your account.

Once it is turned on, you can edit your available payment types in your account settings section.

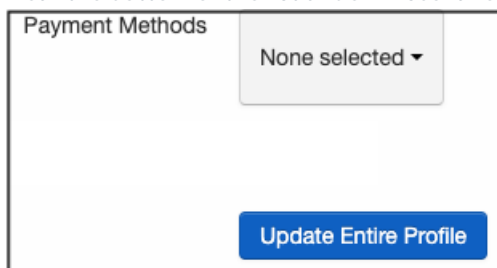
1. Navigate to **Account > Provider Settings**
2. Select the **Medical Billing** tab



3. Scroll down to the Miscellaneous section.



4. Near the bottom of the list under Miscellaneous, you will see an option titled **Payment Methods**



5. If you click on the dropdown, you will see a menu of available payment types

Payment Methods

None selected ▼

- American Express
- Cash
- Check
- Credit Card
- Debit
- Discover
- DrChrono Payments
- Mastercard
- onpatient
- Other
- Patient Payments
- Square (Legacy)
- Square
- Visa

[Update Entire Profile](#)

6. Check the box next to the options you want to show while posting patient payments. Once you are done, press **Update Entire Profile**. Now, when patient payments are posted within your office, the payment types you selected will be the only ones that will show.

New Cash ×

Payment Date

Appointment

Line Item

Provider

Payment Method

Type

Notes

Amount

Receipt

Email Receipt

Text Receipt

Here is a [link](#) to a video that will walk you through the steps to set up customized payment types in your office.
