## **Patient Payments through Stripe in DrChrono**

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# Please Note that Stripe is not available to new customers. Please see our article on DrChrono Payments for setting up payment processing.

DrChrono allows you to process patient payments through the patient's credit card. You can do this through the DrChrono website or allow the patient to pay through OnPatient. Stripe is available to process credit card payments in DrChrono.

#### Stripe Onboarding and Account Verification Process

With recent changes in legislation, Stripe is now required to have more information about each business on file. For that reason, our customers will need to update their Personal and Bank Account Information in order to keep using Stripe beyond the deadline of November 2, 2020.

In this article we will look at:

- Verifying an Existing Account
- What to do if you no longer use your Stripe Account
- Processing Payments with Stripe through DrChrono and through OnPatient

#### **Verifying an Existing Account**

You may see an alert notification at the top of your DrChrono account asking you to update your account or account information.

A red notification means the account has payouts or patient payments is currently disabled.

					ACTION NEEDED	: Your bank account payouts are our	rently disabled due to missing acco	unt information Update Accourt	t Now			
dr chrono												
Schedule Clinical Patien	s Repo	rts Billing Account He	wp \$ X									
0 Oct v 2020 v 0	+ Event	🗂 Today 🛛 Refresh 🔒 Prin	it Appts				€ Oct 21 2020 →					
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11 12 13 14 15 16 17 18 19 20 21 22 23 24	6:00am											
25 26 27 28 29 30 31												
	7:00am											

An orange notification means the account has payouts or patient payments will soon be disabled (usually in days/few weeks).

					ACTION NEEDED: Your b	ank account payouts will soon be	disabled due to missing account in	formation. Update Account In	Now			
dr chrono												
Schedule Clinical Patients	i Repi	orts Billing Account H	eip 🛊 🗙									
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18 19 20 21 22 23 24	6:00am											
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LA Virtual Office	7:00am											

- You can press the Update button to be taken to the Patient Payments settings or go to Account > Provider Settings and select the Patient Payments tab.
- 2. Once in Patient Payments, press Verify Your Account with Stripe to continue.

	9		NEEDED: Your bank	account payo	uts are currer	ntly disabled	d due to missing	g account informati	on Updat	e Account Information	n Now
Billing A	ccount I	lelp 💈	×								
Acco	unt Se	ettings	3								
Profile	General	Email	Medical Billing	eRx Info	Services	Usage	My Billing	Sample Data	Security	Patient Payments	
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Genera	1										
		Require b	palance 🗌 Requ	ire an outstandi	ng patient bala	ince for cred	lit card payments	3			
<b>?</b> d	r chrono										
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TOUL	Jocessing in	10.10.070	+ 0.55 cents. opg		T to receive a						
		Routing N	lumber								
		Account N	lumber								
	Accou	int Holder's	s Name								
,		der's Date (	or Birth								
	Account		Clear b	ank informatio	n						
Your	oank accour	t pavouts a	are currently disable	ed due to mis	sing accoun	t informatio	on				
TOUT 2		- µ, suto u	aloubi			erify your a	account wi <u>th s</u>	tripe			
DrChrono	uses Stripe to	ensure a sec	cure payment system.	By verifying you	ur account info	rmation, you	ı affirm your agre	ement with Stripe's t	erms and cond	litions	

- 3. After the verification process starts, Stripe will let you know what missing information is required to get the account fully verified. Update all fields marked in red.
- 4. Press Update next to Your Business.



5. Edit the business details and press Save.

drchrono
VERIFICATION BY STRIPE
Edit business details
Industry
Software \$
Business website
drchrono.com
No website? You can share an app store link, a business social media profile, or add a product description instead.
Save

6. Press Update next to Management and Ownership.



7. Enter the information and press **Done**.

drchrono	
Additional verification Please provide a few more details about your account.	
Account representative and Executive	Edit
Email address	
executive@company.com	
Phone number	
+1 (201) 555-0123	1
	Done

8. You may see a **Pending** verification message. Pending verification happens when information can't be checked in real-time.

For certain types of verification like ID verification where you might upload a driver's license photo, verification might take a few minutes. Other types of verification might even take longer, but usually, verification happens fairly quickly.

dr	
drchrono	
VERIFICATION BY STRIPE	
Verification summary Modify the details of your business.	
BUSINESS DETAILS	
Your business O	1
MANAGEMENT AND OWNERSHIP	
Account representative and Executive	Update
By clicking Done, you agree that the information provid the best of your knowledge.	led is accurate to
	Done →

9. Your account is verified when no further account information is needed.

Idr chrono	
Routing Number Account Number Account Holder's Name Account Holder's Date of Birth Account Holder's Zip Code	ear bank information
Your bank account verification is in progres	is, please check back later. For assistance, please contact support Verify your account with stripe
DrChrono uses Stripe to ensure a secure payment sys	stern. By verifying your account information, you affirm your agreement with Stripe's terms and conditions

#### No Longer Using Stripe

If you had previously set up Stripe in your DrChrono account, but are no longer using it, you will still see the alert messages to verify your account.

To verify:

- 1. Navigate to Account > Provider Settings
- 2. Select the Patient Payments tab.
- 3. Press the Clear Bank Information button.

Accou	unt Settin	ngs								
Profile	General Er	mail	Medical Billing	g eRx Info	Services	Usage	My Billing	Sample Data	Security	Patient Payments
Genera	l									
<b>?</b> d	r chrono									
	R	Routing I	Number							
	Ad	ccount l	Number							
	Account	Holder	s Name							
	Account Holder	r's Date	of Birth							
	Account Hol	older's Zi	ip Code							
			Cle	ar bank informat	ion 🗸 Your ba	ank account i	nformation is veri	fied		

### **Processing Payments with Stripe**

After setting up and verifying your account, you can process online credit card payments or have patients pay via OnPatient.

### Payments through DrChrono EHR Web

- 1. Navigate to the **patient's appointment window > Billing tab**
- 2. Press the **blue +**

Schedule App	ointment									×
Appointment	Billing	Eligibility	Vitals	Growthcharts	Flags	Log Comm.	Revis	ions Custo	m Data MU H	elper
Institutiona	I Claim					Patient	SuperBill	Clinical Note	Billing Details	Other Forms <b>*</b>
0	Billing Status			~	HCFA Bo	c 10 - Is patient	's conditi	on related to:		
	ICD Version	ICD-10		~		Employme	nt No	~		
Pr	imary Insurer	- Default -		~		Auto Accide	nt No	~		
Seco	ndary Insurer	- Default -		~		Other Accide	nt No	~		
Pat	ient Payment	\$ 0	+ <			One of Data Ta		at Data Tura		
Pre Authoriza	tion Approval					Onset Date Typ	pe - Ons	set Date Type	- •	
	Referral #					Onset Da	ite	er Dete Time		
Pa	yment Profile			~		Other Date Typ	pe - Oth	er Date Type	- •	
	Billing Profile	· ·	/ +			Other Da	ite			
Bi	lling Pick List	Choose Cod	es from Pick List							
Diagn	osis Pick List	Choose Cod	es from Pt Proble	ems						
ICD-10 Cod	00		nd Diagnosia as	dan I	C		Code			andra I
# Code		Description		des	Т			Description	Pr	ice (\$)
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Custom Coo	les	Fi	nd Custom Proc	edure codes 🔸	NE	C Codes		Fit	nd NDC Codes	+
Code	Descriptio	on	Price	(\$)	NDC	Code	Quanti	ty U	nits Line	tem
Include note in	EDI Billing:	Custom N7	E EDI Billing No	ote (a.k.a. HCFA/C	MS-1500 Li	ne 19)				
			(	Delete Save & C	Close Sav	e Cancel				

3. The New Cash window will open. It will allow you to process the payment and send the patient either an email or text receipt.

New Cash		×
Payment Date	MM/DD/YYYY	
Appointment	~	
Line Item	-Auto Allocate-	
Provider	~	
Payment Method	DrChrono Payments	
Туре	Credit ~	
Notes		
Amount	\$	
Receipt		
Email Receipt		
Text Receipt		
	Cancel Pay w	rith card

4. The record of the payment will appear in the **Transaction History** in the patient's chart.

Demographics	3			
✓ Sufficient patient de	emographics to bill insu	rance.		
Important	Demographics	Insurances	Authorizations	Smoking Status
Patient Account	Balance			
Total Billed		\$1,325.0	00	
Total Allocated		\$290.00		
Total Patient Paid:		\$490.00		
Patient Balance:		\$-115.00	D	
Last Patient Payment:	/			
Full Transaction Histor	y Patient Payments	Print Balance Report	]	

### Payments via OnPatient

- 1. Navigate to Account > Provider Settings > Patient Payments
- 2. Scroll down to the **OnPatient tab**

	ii Wedicai Dilling	enx into	Services	Usage S	Sample Data	Security	Fallent Fayments	
General								
Require balar	ce 🛛 Require an outs	standing patien	t balance for cre	dit card paymer	nts			
DrChrono Payments								
dr chrono								
© onpatient	1							
Allow onpatient payme	ts Allow patients v	with onpatient a	access to make p	payments throu	gh the onpatient	portal		
Minimum onpatient payme	ts 5.00		Set mini	imum amount fo	or payments from	onpatient		
uto Allocations								
uto Allocations Auto Allocate	Automatically alloc	cate to line item	is when patient b	balance is availa	able.			
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- 3. Select the box to allow OnPatient payments
- 4. Fill in the minimum amount you would allow to be processed through OnPatient

# A patient can add a card to make a payment via their OnPatient Portal after logging in.

1. Navigate to **Billing > Payment Methods**. Enter the card information and press **Save Card**.

onpatient	Appointments	Doctors	Billing	Messages	Documents	0	Health Profile		۵	
Billing									Make a payment	
Statements	Select a D	octor								
Payment History	Saved Car	rds					Add a Card			
Payment Methods	Card	Name		Expiration			Card number			
×	No payment	methods sav	ved							
	•						Expiration Date			
								~	~	
							Name on card			1
							cvc		Zip code	1
									Save Card	

2. The patient can then press Make Payment or if you have sent a statement to OnPatient they can go to Statements > Pay.

onpatient	Appointments Do	ctors Billing	Messages	Documents 1	Health Profile	(*
Billing						Make a payment
Statements	Select a Docto	or				
Payment History	Saved Cards				Add a Card	
Payment Methods	Card	Name	Expiration	1	Card saved successfully	×
	XXXXXXXXXXXXXX			× Remove		
					Card number	
					Expiration Date	
						•
					Name on card	
					CVC	Zip code
						Save Card

3. The record of the payment will appear in the **Transaction History** in the patient's chart.