

# Patient Payments through Stripe in DrChrono

07/08/2024 7:36 pm EDT

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.

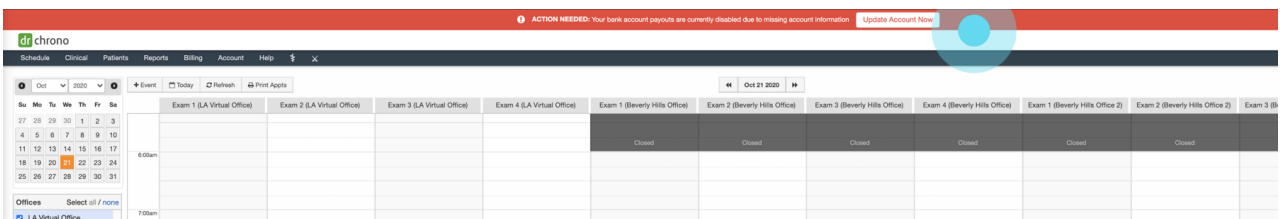
In this article we will look at:

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

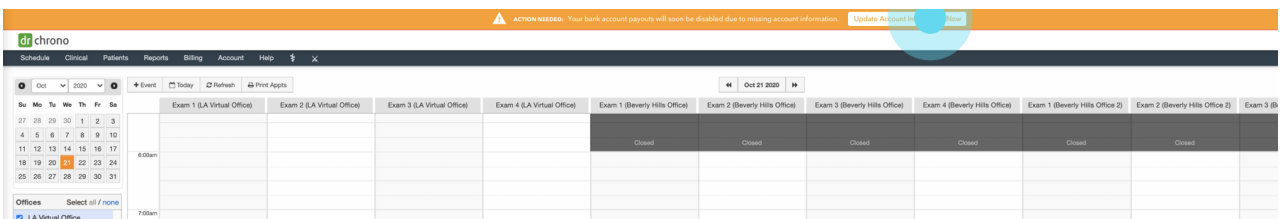
## Verifying an Existing Account

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.



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



1. You can click on the **Update** button to be taken to the Patient Payments settings or go to **Account > Provider Settings** and click on the **Patient Payments** tab.

ACCOUNT SETTINGS

User Settings

Provider Settings

onpatient Settings

Account Setup

Custom Fields

2. Once in Patient Payments, click **Verify Your Account with Stripe** to continue.

**ACTION NEEDED:** Your bank account payouts are currently disabled due to missing account information [Update Account Information Now](#)

# Account Settings

Profile General Email Medical Billing eRx Info Services Usage My Billing Sample Data Security Patient Payments

## General

Require balance  Require an outstanding patient balance for credit card payments

 dr chrono

Your processing fee is: 3.5% + 0.35 cents. Upgrade your plan to receive a lower rate.

Routing Number

Account Number

Account Holder's Name

Account Holder's Date of Birth

Account Holder's Zip Code

[Clear bank information](#)

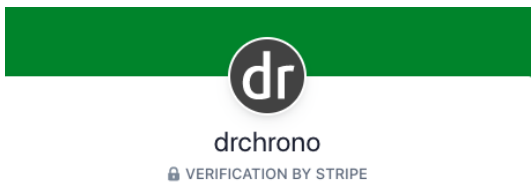
Your bank account payouts are currently disabled due to missing account information

[Verify your account with stripe](#)

DrChrono uses Stripe to ensure a secure payment system. By verifying your account information, you affirm your agreement with Stripe's [terms and conditions](#)


2. 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.

Click **Update** next to **Your Business**. Edit the business details and click **Save**.




**Verification summary**  
Modify the details of your business.

**BUSINESS DETAILS**

 **Your business**   
⚠ More information required now

**MANAGEMENT AND OWNERSHIP**

 **Account representative and Executive**   
⚠ More information required now

By clicking Done, you agree that the information provided is accurate to the best of your knowledge.

The image shows the top header of the drchrono interface, identical to the first image, with the 'dr' logo and 'drchrono VERIFICATION BY STRIPE' text.

**Edit business details**

**Industry**

**Business website**

No website? You can share an app store link, a business social media profile, or [add a product description instead.](#)

Click **Update** next to **Management and Ownership**. Enter the information and click **Done**.

The screenshot shows the top of the drchrono verification interface. At the top is a green header with the 'dr' logo. Below it, the text 'drchrono' and 'VERIFICATION BY STRIPE' is displayed. The main content area is divided into sections: 'Verification summary' with the instruction 'Modify the details of your business.', 'BUSINESS DETAILS' with a sub-section 'Your business' and an edit icon, and 'MANAGEMENT AND OWNERSHIP' with a sub-section 'Account representative and Executive' and an 'Update' button. At the bottom, there is a disclaimer: 'By clicking Done, you agree that the information provided is accurate to the best of your knowledge.' and a blue 'Done →' button.

This screenshot shows the 'Additional verification' section of the drchrono interface. It features a green header with the 'dr' logo and the text 'drchrono' and 'VERIFICATION BY STRIPE'. The section is titled 'Additional verification' with the instruction 'Please provide a few more details about your account.' Below this, there is a field for 'Account representative and Executive' with an 'Edit' button. Further down, there are two input fields: 'Email address' containing 'executive@company.com' and 'Phone number' containing '+1 (201) 555-0123'. At the bottom, there are two buttons: a grey 'Cancel' button and a blue 'Done' button, with a black arrow pointing from 'Cancel' to 'Done'.

3. 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 ✓

**MANAGEMENT AND OWNERSHIP**

Account representative and Executive  Update  
⌂ Pending verification

By clicking Done, you agree that the information provided is accurate to the best of your knowledge.

Done →

**dr** chrono

Your processing fee is: 2.5% + 0.35 cents.

Routing Number   
 Account Number   
 Account Holder's Name   
 Account Holder's Date of Birth   
 Account Holder's Zip Code

Clear bank information

Your bank account verification is in progress, please check back later. For assistance, please contact [support](#)

Verify your account with stripe

DrChrono uses Stripe to ensure a secure payment system. By verifying your account information, you affirm your agreement with Stripe's [terms and conditions](#)

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

**dr** chrono

Your processing fee is: 3.5% + 0.35 cents. Upgrade your plan to receive a lower rate.

Routing Number   
 Account Number   
 Account Holder's Name   
 Account Holder's Date of Birth   
 Account Holder's Zip Code

Clear bank information ✓ Your bank account information is verified

## 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. You can go to **Account > Provider Settings** and click on the **Patient Payments** tab. Next click on the **Clear Bank Information** button.

# Account Settings

[Profile](#) [General](#) [Email](#) [Medical Billing](#) [eRx Info](#) [Services](#) [Usage](#) [My Billing](#) [Sample Data](#) [Security](#) [Patient Payments](#)

## General



Your processing fee is: 3.5% + 0.35 cents. Upgrade your plan to receive a lower rate.

Routing Number

Account Number

Account Holder's Name

Account Holder's Date of Birth

Account Holder's Zip Code

 [Clear bank information](#) ✔ Your bank account information is verified

## Processing Payments with Stripe

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

## Payments through DrChrono EHR Web

1. You can begin in the Appointment window under the **Billing** tab by clicking **Process Credit Card**. This will take you to the patient's chart. (You could also go directly to the patient's chart and click on the **OnPatient Payments** tab).

### Schedule Appointment

Appointment **Billing** Eligibility Vitals Growthcharts Flags Log Comm. Revisions Custom Data MU Helper

Patient SuperBill Clinical Note Billing Details Other Forms

**Billing Status**

ICD Version

Patient Payment \$ 3.00 Copay: \$20

Pre Authorization Approval

Referral #

Payment Profile

Billing Profile

Billing Pick List

Diagnosis Pick List

Credit Card Payment

**HCFA Box 10 - Is patient's condition related to:**

Employment

Auto Accident

Other Accident

Onset Date Type

Onset Date

Other Date Type

Other Date

Claim Billed: \$1.00 Adjustment: \$0.00 Insurer Paid: \$0.00 Patient Paid: \$0.00

**ICD-10 Codes**

#	Code	Description
1	M54.5	Low back pain

**ICD-9 Codes to Convert**

#	Code	Description
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**NDC Codes**

NDC Code	Quantity	Units	Line Item
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**Custom Codes**

Code	Description	Price (\$)
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**CPT Codes**

Code	Description	Price (\$)
1 99213	OFFICE/OUTPATIENT VISIT EST	1.00

Modifiers:

Quantity/Minutes:

Diagnosis Pointers:

**HCPCS Codes**

Code	Description	Price (\$)
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2. After navigating to the OnPatient Payments tab, click Add Card.

Demographics

Appointments

Clinical Dashboard

Documents

Tasks 2

Problem List 13

Medication List

Send eRx

Allergy List 4

Drug Interactions 1

CQMs

Intake Data

Lab Orders

Immunizations

Growth Charts

onpatient Access

Education Resources

Communication

Family History

**Jenny (Jen) Harris** (Female | 40 years old | Feb. 11, 1980)

Phone: (650) 215-6343 Email: Missing Date Added: Aug. 13, 2020

Address: 328 Gibraltar Ave Sunnyvale, CA 94040 Last Scheduled Appt: Thu Oct 22, 2020

CDS: Adult Immunization Schedule Age: 27-49 Next Scheduled Appt:

HAJE000001

Primary Provider: James Smith

Important Demographics Insurances Eligibility Authorizations Smoking Status Flags Balance onpatient Payments

Sufficient patient demographics to bill insurance.

**Patient Payments**

Balance		Process Payment	
Total Billed	\$2,401.00	Total Allowed	\$2,401.00
Total Allocated	\$62.00	Total Adjustment	\$0.00
Total Patient Paid:	\$80.00	Total Insurance Paid	\$50.00
Patient Balance:	\$1,480.00	Insurance Balance:	\$791.00

**Saved Cards**

No payment methods saved

**Transaction History**

Payment Date	Date of Service	Notes	Amount	Processing Fees	Status
No payments processed					

3. Enter the card information and click Save Card Details.



Card number

Name on card

Expiration  /

CW   
Usually found on the back of the card.

Billing zip code

4. Click **Process Payment** to charge the card.

### Charge Credit Card

Card

Amount

Appointment

Charge Full Balance (0.00)

Additional Notes

5. Click **Confirm Payment**.

### Charge Credit Card

Jenny (Jen) Harris will be charged \$1.00. You will receive \$0.62 (\$1.00 - \$0.38 in transaction fees)

6. Chose **Print Receipt, Email Receipt, or Close**.



## Patient Charged

×

Jenny (Jen) Harris was charged \$1.00

Close

Print Receipt


Email Receipt

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

### Transaction History

Payment Date	Date of Service	Notes	Amount	Processing Fees	Status			
Oct 23, 2020 11:43:34 AM	10/22/2020 09:20AM	Paid via drchrono patient payments.	\$1.00	\$0.38	Pending	Print Receipt	Email Receipt	Refund

## Payments via OnPatient

To enable payments, navigate to **Account > Provider Settings > Patient Payments** and click on the (  ) icon.

Check the **Allow OnPatient Payments** box and select **Stripe** from the dropdown menu. Click **Update Entire Profile** to save your settings.

## Account Settings

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### General

Require balance  Require an outstanding patient balance for credit card payments





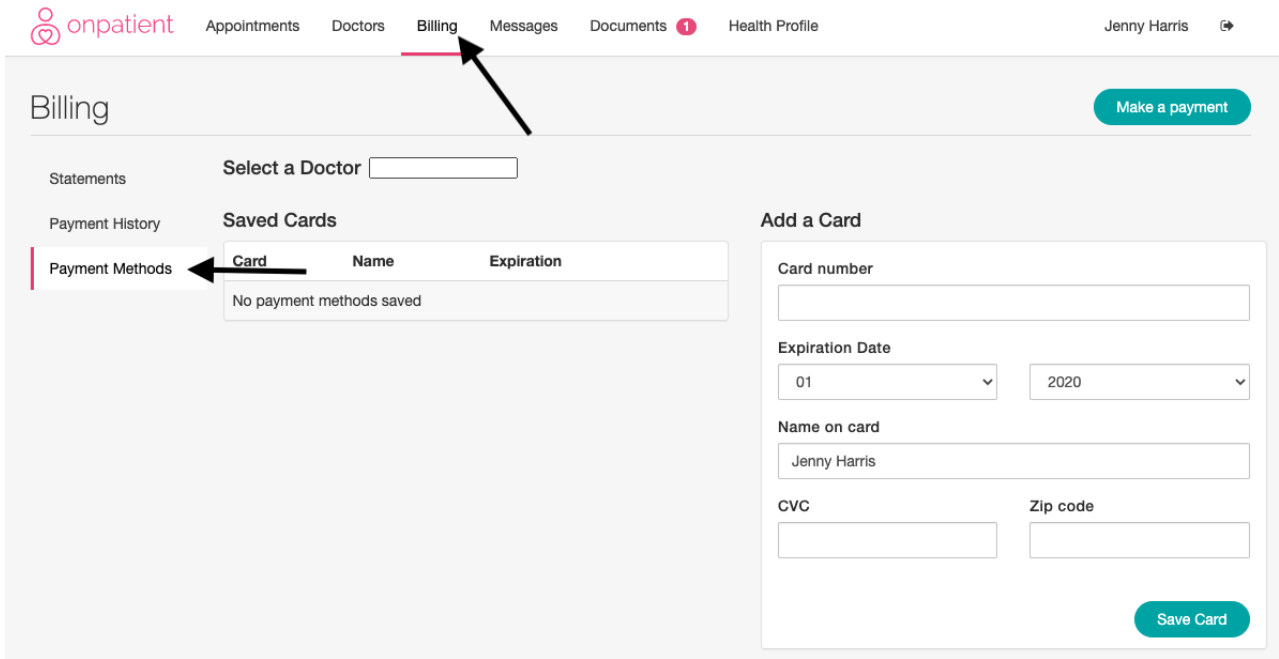
Allow onpatient payments  Allow patients with onpatient access to make payments through the onpatient portal

onpatient payment default

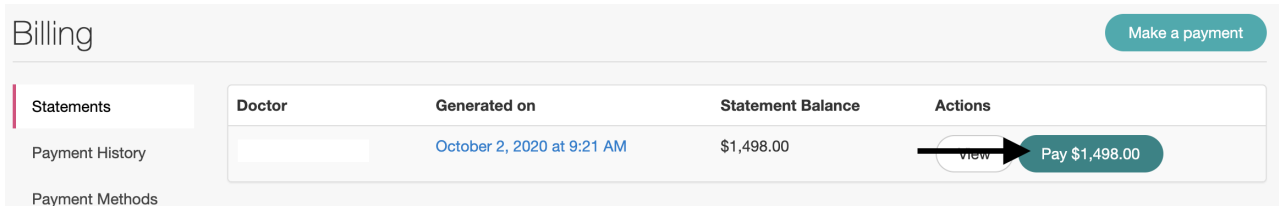
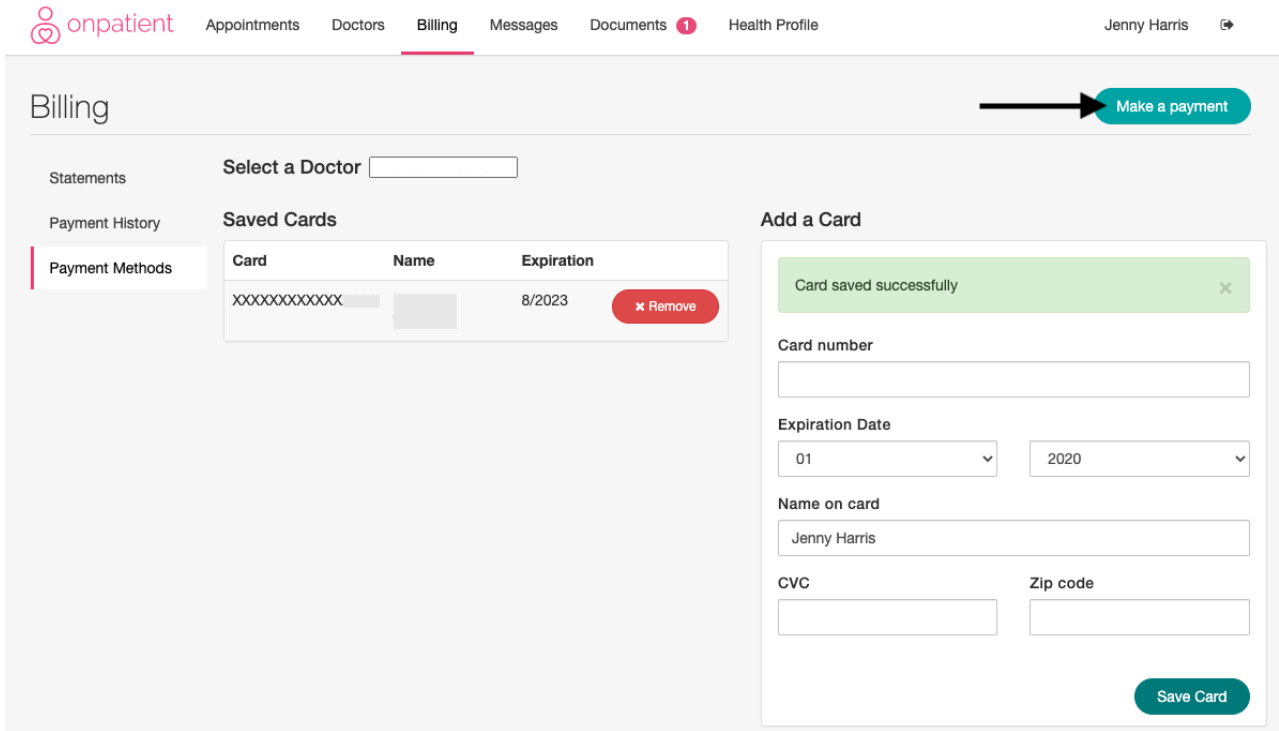
Minimum onpatient payments  Set minimum amount for payments from onpatient

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

1. Go to **Billing > Payment Methods**. Enter the card information and click **Save Card**.



2. The patient can then click **Make Payment** or if you have [sent statements](#) to OnPatient they can go to **Statements > Pay**.



3. The patient will click **Pay** with the amount they entered or the statement amount.

**Make Payment** ✕

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Doctor

Card  
 Visa 08/2023

Amount  
 \$ 1

Cancel Pay \$1.00

**Pay Statement** ✕

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Doctor

Card  
 Visa 08/2023

Amount  
 \$ 1498.00

Cancel Pay \$1,498.00

4. The patient will **Confirm** the payment.

**Make Payment** ✕

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Your saved card ending in  will be charged \$1.00 to

Back Confirm

5. There will be a confirmation of successful payment.

**Make Payment** ✕

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Successfully paid **\$1.00.**

Done Paid \$1.00

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

**Transaction History**

Payment Date	Date of Service	Notes	Amount	Processing Fees	Status			
Oct 23, 2020 11:57:56 AM	N/A	Paid via onpatient.	\$1.00	\$0.38	Pending	<span>Print Receipt</span>	<span>Email Receipt</span>	<span>Refund</span>
Oct 23, 2020 11:43:34 AM	10/22/2020 09:20AM	Paid via drchrono patient payments.	\$1.00	\$0.38	Paid	<span>Print Receipt</span>	<span>Email Receipt</span>	<span>Refund</span>

All patient data listed in this article is sample data. This is not a real person or real patient data.

