

# Patient Payments through Stripe in DrChrono

Last modified on 02/28/2025 9:34 am EST

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.

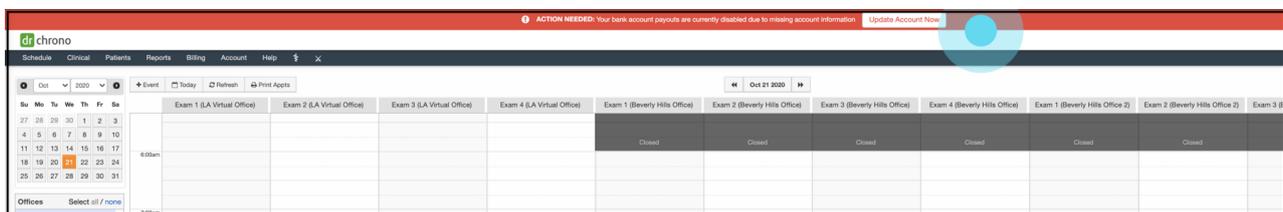
In this article we will look at:

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

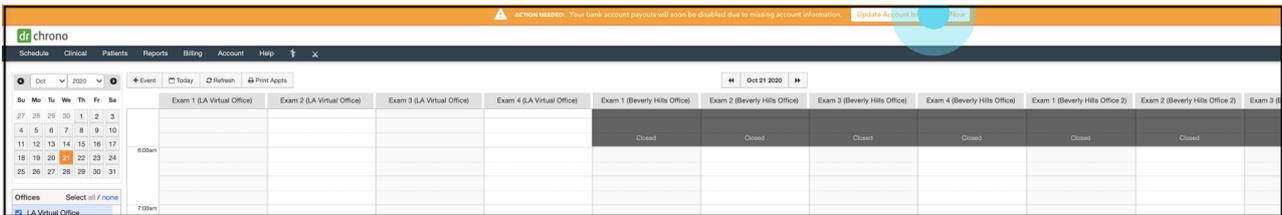
## Verifying an Existing Account

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

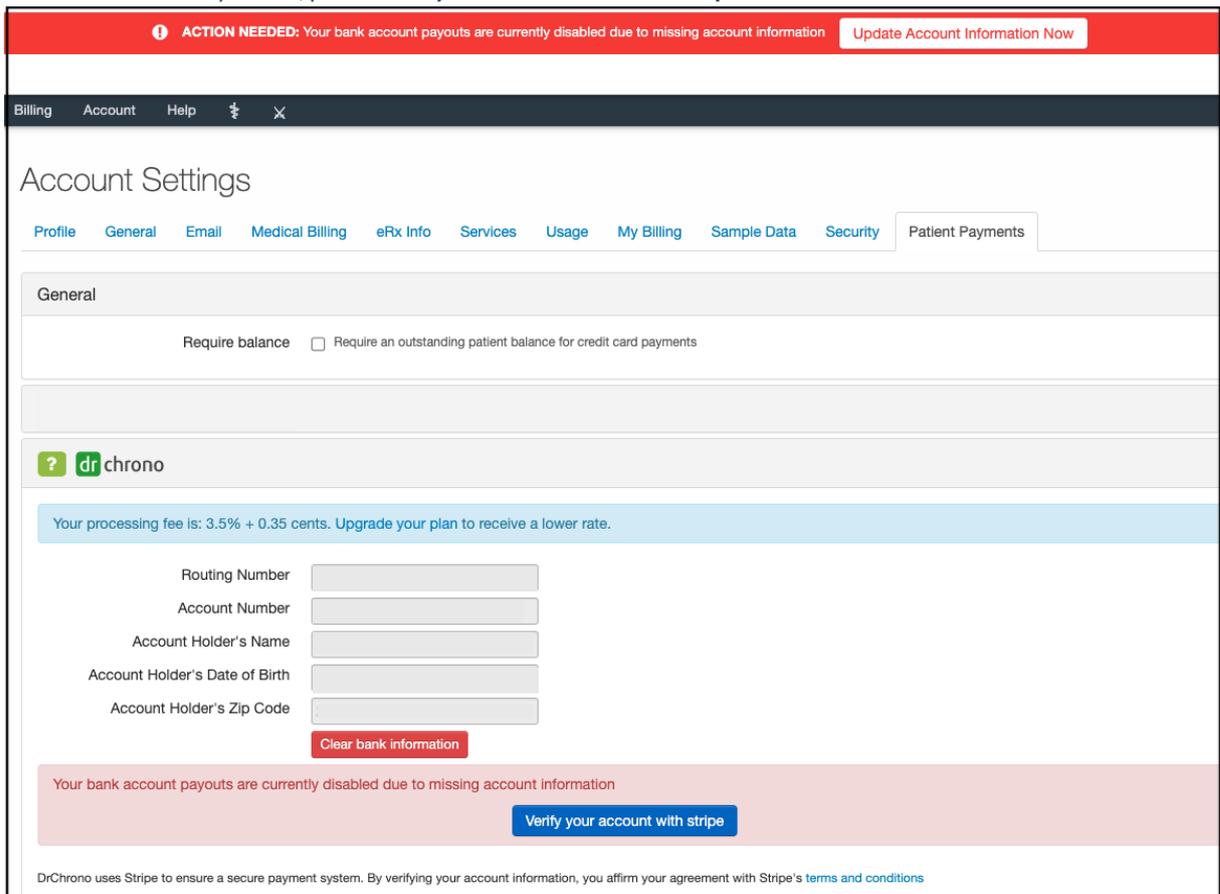
A red notification means the account has payouts or patient payments is currently disabled.



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



1. You can 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.



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**.

The screenshot shows the drchrono verification interface. At the top, there is a green header with the 'dr' logo. Below the logo, 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 'Your business' entry that has a red warning icon and the text 'More information required now', and 'MANAGEMENT AND OWNERSHIP' with an 'Account representative and Executive' entry also showing a red warning icon. Both entries have 'Update' buttons. 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. A red arrow points to the 'Update' button in the 'Your business' section.

5. Edit the business details and press **Save**.

The screenshot shows the 'Edit business details' page. It features a green header with the 'dr' logo and the text 'drchrono' and 'VERIFICATION BY STRIPE'. The main content area is titled 'Edit business details' and contains two input fields: 'Industry' with a dropdown menu showing 'Software' and 'Business website' with a text input field containing 'drchrono.com'. Below these fields, there is a note: 'No website? You can share an app store link, a business social media profile, or [add a product description instead.](#)' A blue 'Save' button is located at the bottom right, with a red arrow pointing to it.

6. Press **Update** next to **Management and Ownership**.

**dr**  
drchrono  
VERIFICATION BY STRIPE

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

**BUSINESS DETAILS**

Your business ✓ 

**MANAGEMENT AND OWNERSHIP**

 Account representative and Executive

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

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

**dr**  
drchrono  
VERIFICATION BY STRIPE

**Additional verification**  
Please provide a few more details about your account.

Account representative and Executive [Edit](#)

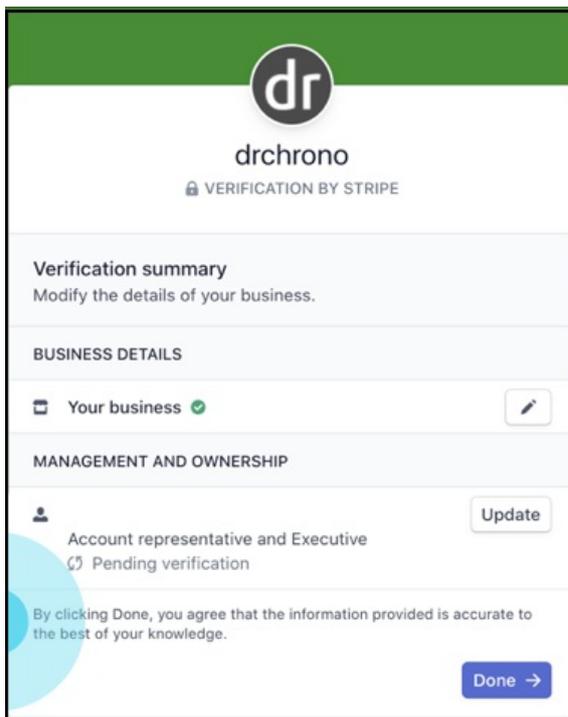
**Email address**  
executive@company.com

**Phone number**  
+1 (201) 555-0123

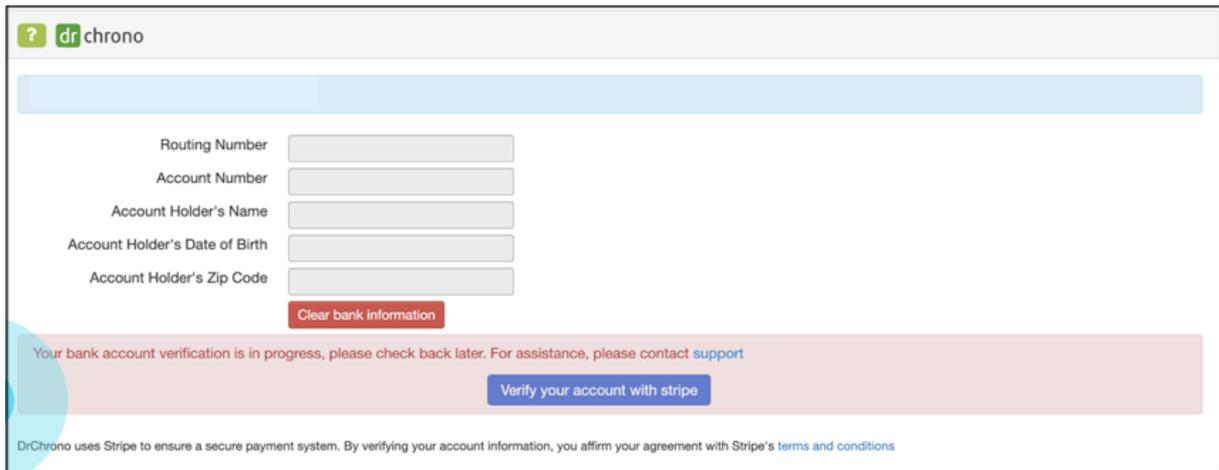
[Done](#)

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.



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



## 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.

Account Settings

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

General



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 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 Appointment** ✕

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

Institutional Claim Patient SuperBill Clinical Note Billing Details Other Forms ▾

**Billing Status**

ICD Version

Primary Insurer

Secondary Insurer

Patient Payment \$

Pre Authorization Approval

Referral #

Payment Profile

Billing Profile

Billing Pick List

Diagnosis Pick List

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

Employment

Auto Accident

Other Accident

Onset Date Type

Onset Date

Other Date Type

Other Date

**ICD-10 Codes**  ▾

#	Code	Description

**CPT and HCPCS Codes**  ▾

Type	Code	Description	Price (\$)

**Custom Codes**  ▾

Code	Description	Price (\$)

**NDC Codes**  ▾

NDC Code	Quantity	Units	Line Item

Include note in EDI Billing:

- 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

Appointment

Line Item

Provider

Payment Method

Type

Notes

Amount \$

**Receipt**

Email Receipt

Text Receipt

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

### Demographics

✓ Sufficient patient demographics to bill insurance.

Important	Demographics	Insurances	Authorizations	Smoking Status
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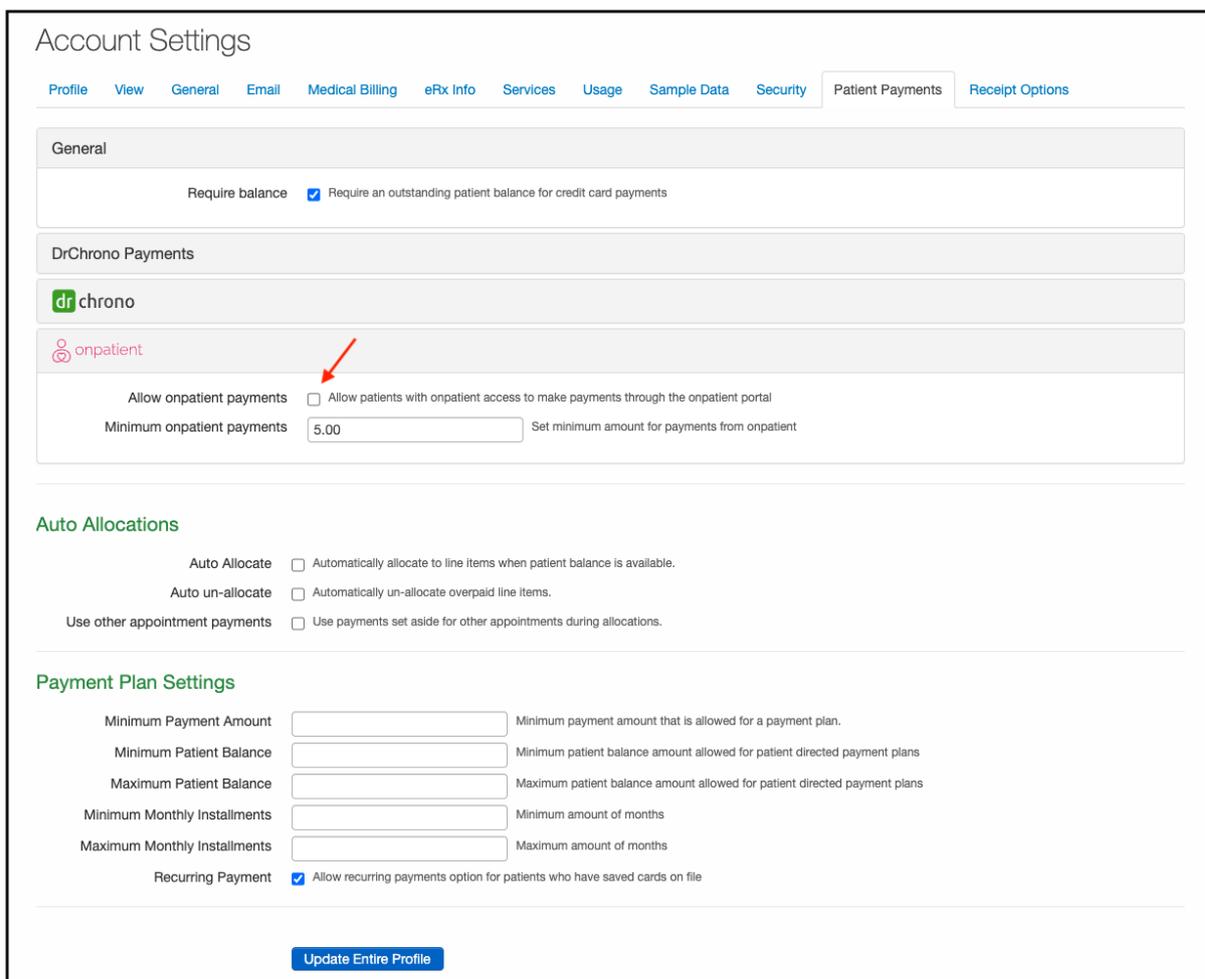
**Patient Account Balance**

<b>Total Billed</b>	\$1,325.00
<b>Total Allocated</b>	\$290.00
<b>Total Patient Paid:</b>	\$490.00
<b>Patient Balance:</b>	\$-115.00
<b>Last Patient Payment:</b>	

↙

## Payments via OnPatient

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



The screenshot shows the 'Account Settings' page with the 'Patient Payments' tab selected. The 'Onpatient' section is highlighted with a red arrow pointing to the 'Allow onpatient payments' checkbox, which is currently unchecked. Below it, the 'Minimum onpatient payments' is set to 5.00. The 'Auto Allocations' and 'Payment Plan Settings' sections are also visible.

Account Settings

Profile View General Email Medical Billing eRx Info Services Usage Sample Data Security Patient Payments Receipt Options

General

Require balance  Require an outstanding patient balance for credit card payments

DrChrono Payments

dr chrono

onpatient

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

Minimum onpatient payments  Set minimum amount for payments from onpatient

Auto Allocations

Auto Allocate  Automatically allocate to line items when patient balance is available.

Auto un-allocate  Automatically un-allocate overpaid line items.

Use other appointment payments  Use payments set aside for other appointments during allocations.

Payment Plan Settings

Minimum Payment Amount  Minimum payment amount that is allowed for a payment plan.

Minimum Patient Balance  Minimum patient balance amount allowed for patient directed payment plans

Maximum Patient Balance  Maximum patient balance amount allowed for patient directed payment plans

Minimum Monthly Installments  Minimum amount of months

Maximum Monthly Installments  Maximum amount of months

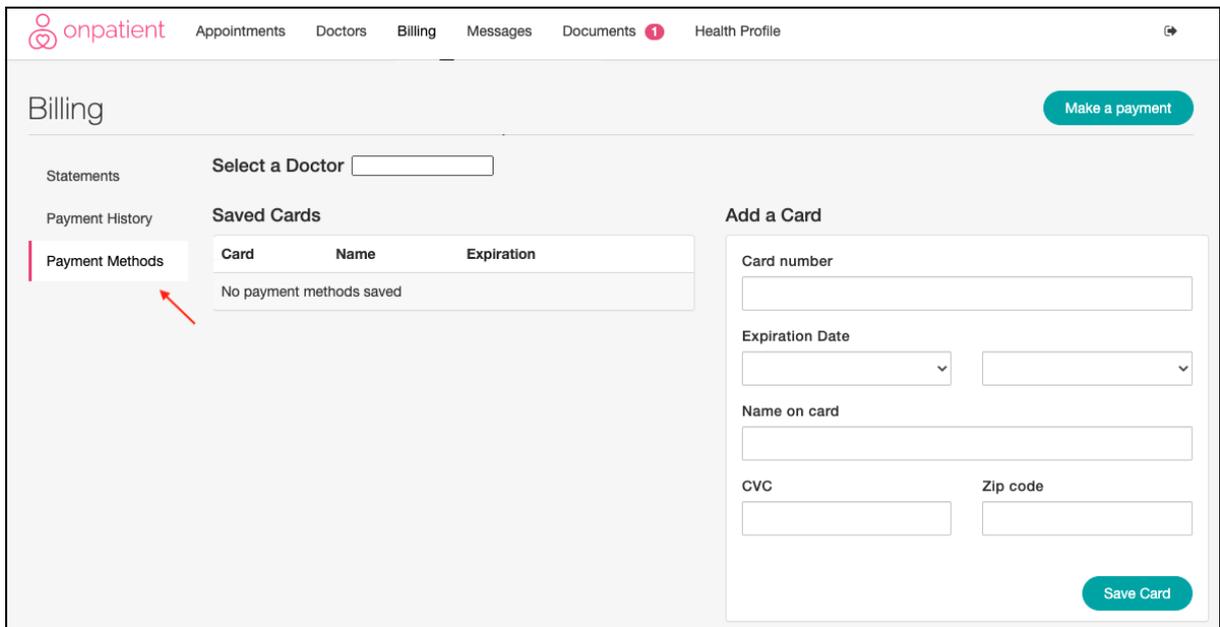
Recurring Payment  Allow recurring payments option for patients who have saved cards on file

[Update Entire Profile](#)

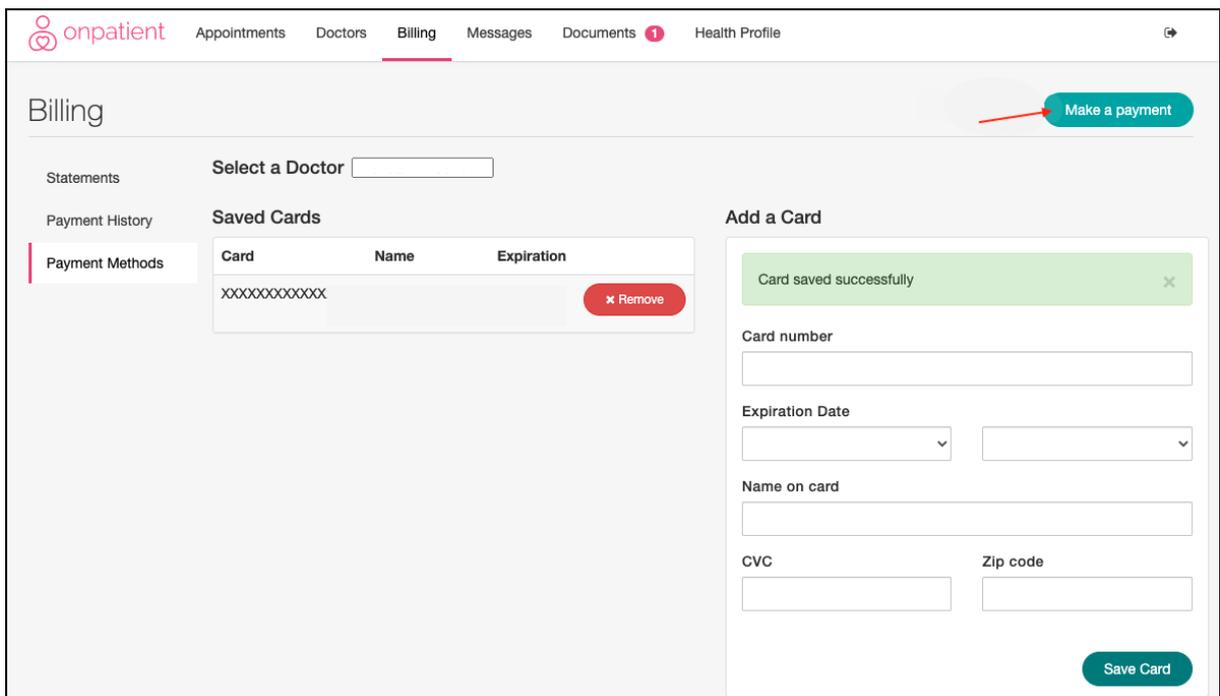
3. Select the box to allow OnPatient payments
4. Fill in the minimum amount you would allow to be processed through OnPatient

## 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**.



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



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