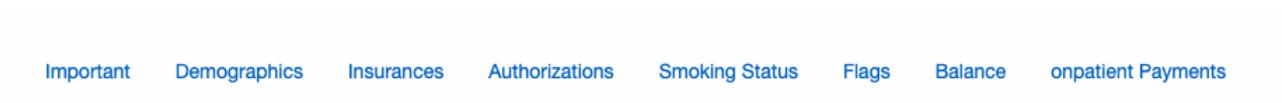# Patient Payment Plans: Creating a plan for your patient
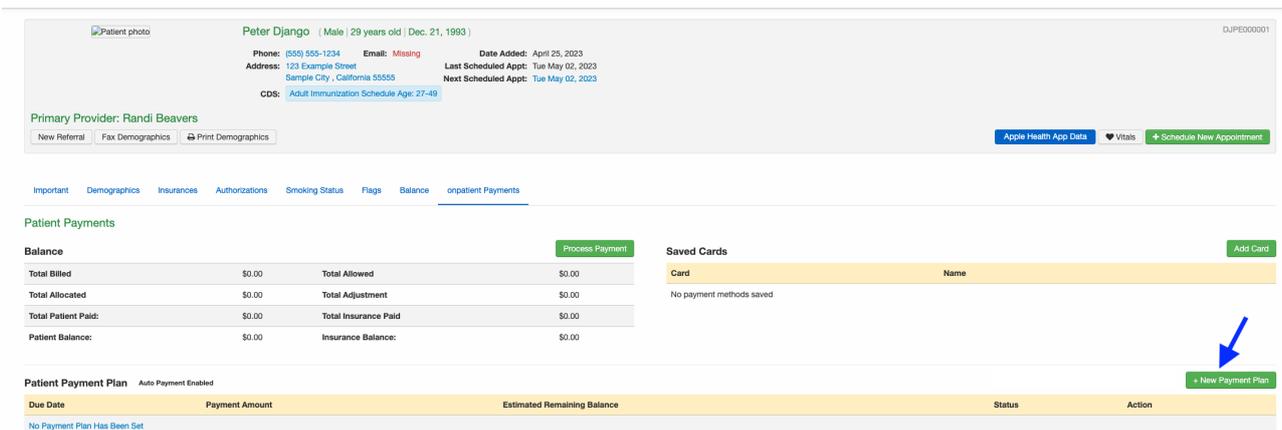
07/08/2024 7:41 pm EDT

Once you have set the parameters for your account for patient payment plans, you can set up an individual patient plan for your patients.

Here's how:

- Navigate to your patient's chart and select the OnPatient Payment tab > Patient Payment Plan

- Under the Patient Payment Plan header, select **+ New Payment Plan**

- The details window will open. You will have 2 separate options for the payment plan type. One will consider the total patient balance where you will be able to select the dollar amount to be included in the payment plan.
  - Using the screenshot below, if you only want to include $3,000 in the payment plan, you would enter that on the "Payment Plan Amount" line.

Create Payment Plan   ✕

Payment Option	⦿ Patient Total Balance
	○ Selected Appointments
Patient Total Balance	5787.56
Payment Plan Amount	$ XX.XX
Duration	⌄
Monthly Payment	0
First Payment Date	mm/dd/yyyy 📅

Close   **Create Payment Plan**

- The other will allow you to select specific appointments to include in the plan.

Create Payment Plan   ✕

Payment Option	○ Patient Total Balance
	⦿ Selected Appointments
Appointment	None selected ▾
Total Balance of Selected Appointments	0
Duration	⌄
Monthly Payment	0
First Payment Date	mm/dd/yyyy 📅

Close   **Create Payment Plan**

- If you click on the down arrow next to "Appointment", you will be shown the appointments in the Balance Due status. You can select which appointments you would like to include in the payment plan.

Create Payment Plan   ✕

Payment Option	◯ Patient Total Balance
	⦿ Selected Appointments
Appointment	11/03/2023 08:00AM ($6.12 - Balance Due) ▾

☐ 12/01/2023 09:45AM ($19.00 - Balance Due)
☐ 11/23/2023 03:00PM ($10.52 - Balance Due)
☐ 11/13/2023 04:45PM ($43.07 - Balance Due)
☐ 11/10/2023 05:15PM ($55.77 - Balance Due)
☐ 11/06/2023 05:45PM ($6.09 - Balance Due)
✓ 11/03/2023 08:00AM ($6.12 - Balance Due)
☐ 10/13/2023 11:30AM ($0.70 - Balance Due)

Total Balance of Selected Appointments

Duration

Monthly Payment

First Payment Date

Close   Create Payment Plan

- **Payment Option** -
  - **Patient Total Balance** - This will consider the total patient balance when setting up a payment plan.
  - **Selected Appointments** - This will allow you to select individual appointments to be included in a payment plan.
- **Appointment** - The drop-down will allow you to select individual appointments to be included in the patient's payment plan.
- **Total Balance of Selected Appointments** - The total dollar amount to be included in the patient's payment plan.
- **Duration** - How long will the payment plan last? The available options can be customized by your practice.
- **Monthly Payment** - The system will calculate this automatically based on the amount due and the plan's duration.
- **First Payment Date** - The date the first payment will be charged to the card saved on file.
- **Enable Auto Payment** - This will automatically charge the patient's default credit card on file, the amount due, up to the payment plan amount, on the payment date. This feature will only work if you are utilizing DrChrono Payments as your payment processor.

Please note - if you select "enable auto payment", an additional line will open to allow you to enter the patient's credit card if there is not one saved to the patient's chart. The recurring charge feature will only work if you are utilizing DrChrono Payments as your payment processor.

Create Payment Plan ✕

Payment Option	⦿ Patient Total Balance
	◯ Selected Appointments
Patient Total Balance	7146.82
Payment Plan Amount	$ 0
Duration	⌄
Monthly Payment	0
First Payment Date	mm/dd/yyyy 📅
Enable Auto Payment	☑
Card	⌄
	No cards available ⌄

Close   **Create Payment Plan**

Examples:

Example #1 - The patient has a $100 balance and wants to pay it off over 4 months. The office staff would enter the payment plan amount ($100) and the duration (4 months). The system would automatically calculate the monthly payment as $25.00.

Create Payment Plan ✕

Payment Option	⦿ Patient Total Balance
	◯ Selected Appointments
Patient Total Balance	100.00
Payment Plan Amount	$ 100.00
Duration	4 Months ⌄
Monthly Payment	25.00
First Payment Date	mm/dd/yyyy 📅
Enable Auto Payment	☐

Close   **Create Payment Plan**

Example #2 - The patient has a $100 balance and wants to pay it off over 2 months. The office staff would enter the payment plan amount ($100) and the duration (2 months). The system would automatically calculate the monthly payment as $50.00.

Create Payment Plan

Payment Option	◉ Patient Total Balance
	○ Selected Appointments
Patient Total Balance	100.00
Payment Plan Amount	$ 100.00
Duration	2 Months ⌄
Monthly Payment	50.00
First Payment Date	mm/dd/yyyy 📅
Enable Auto Payment	☐

[Close] [**Create Payment Plan**]

Once the patient and office agree on the plan (amount, duration, and card to charge), click on **Create Payment Plan**.

The scheduled payments will appear under the **Patient Payment Plan** heading.

Patient Payment Plan Auto Payment Enabled

Due Date	Payment Amount
Oct 1, 2023 12:00:00 AM	50.00
Sep 1, 2023 12:00:00 AM	50.00