

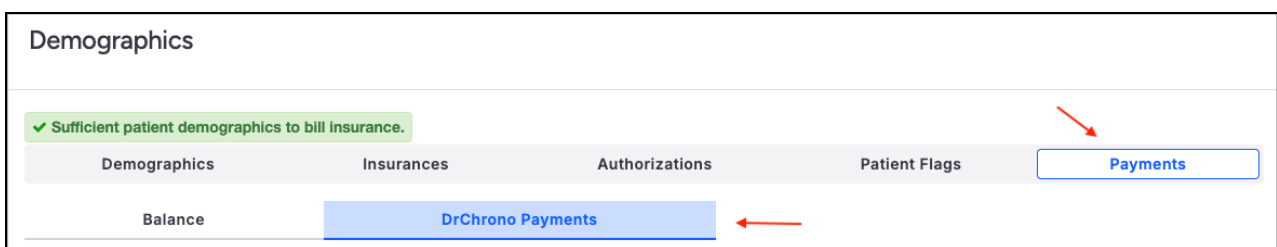
Patient Payment Plans: Flag on patient account

Last modified on 05/20/2025 2:07 pm EDT

Once your patient is placed on a monthly payment plan, the system will automatically add a flag to their account to alert your staff that the payment plan exists.

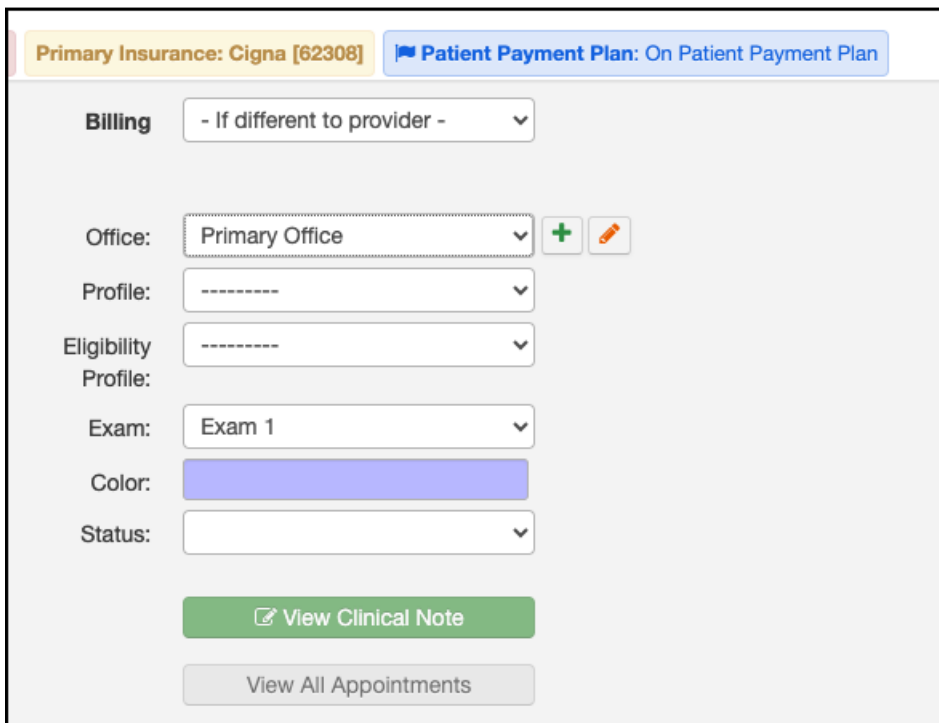
It will be in the usual places where you expect to see patient flags including the live claims feed, the demographic section of their chart, and in the appointment window.

In the demographic section of the patient's chart:



The screenshot shows the 'Demographics' section of a patient's chart. At the top, there is a green status bar that reads '✓ Sufficient patient demographics to bill insurance.' Below this, there is a horizontal navigation bar with five tabs: 'Demographics', 'Insurances', 'Authorizations', 'Patient Flags', and 'Payments'. The 'Payments' tab is highlighted with a blue border and a red arrow pointing to it. Below the navigation bar, there is a section titled 'Balance' with a blue bar labeled 'DrChrono Payments' and a red arrow pointing to it.

In the appointment window:



The screenshot shows the appointment window. At the top, there is a yellow box labeled 'Primary Insurance: Cigna [62308]' and a blue box labeled 'Patient Payment Plan: On Patient Payment Plan'. Below these, there is a 'Billing' section with a dropdown menu set to '- If different to provider -'. The 'Office' section has a dropdown menu set to 'Primary Office' with a green plus icon and an orange edit icon. The 'Profile' section has a dropdown menu set to '-----'. The 'Eligibility Profile' section has a dropdown menu set to '-----'. The 'Exam' section has a dropdown menu set to 'Exam 1'. The 'Color' section has a blue color picker. The 'Status' section has a dropdown menu set to '-----'. At the bottom, there is a green button labeled 'View Clinical Note' and a grey button labeled 'View All Appointments'.

In the Live Claims Feed:

Primary Insurer: (62308) Cigna

🚩 Patient Payment Plan: On Patient Payment Plan

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Line Item	NDC Code
<input type="text"/>	<input type="text" value="Add NDC code"/>