

Posting a patient payment in the Patient Payments screen

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Posting a patient payment in DrChrono is very easy!

1. Navigate to **Billing > Patient Payments**

The screenshot shows the DrChrono Patient Payments interface. At the top, there's a navigation bar with 'Billing' selected. Below it, the 'Patient Payments' section is active, showing a search box for 'Patient', date range filters, and view toggles for 'Simple' and 'Condensed' (both set to 'On'). A message 'Please select a patient.' is displayed. A summary table shows: Appointment Balance: \$5.00, Total Payment: \$66.00, Unallocated Payment: \$66.00, Current Patient Responsibility: -\$61.00.

2. By default, **Simple** and **Condensed** views will both be set to **On**. This provides you with the cleanest, most straightforward view possible. To view more in-depth information, switch those views to **Off**.

3. Select a patient by entering their name in the search box on the top left. You can also choose a date range, and/or filter using a balance (\$) filter.

4. Press **Update** to populate the information

The screenshot shows the DrChrono Patient Payments interface with a list of payments for Tina Adams. The 'Patient' dropdown is selected with 'Tina Adams'. The 'Update' button is highlighted. The table below shows payment details: Total Paid: \$490.00, Allocated Payment (Paid to Appt): \$290.00, Unallocated Payment: \$200.00, Statement Balance: \$100.00, Total Balance: -\$115.00. The payment list includes columns for #, Unallocated, Posted Date, Payment Date, Appointment, Line Item, Provider, Payment Method, Type, Notes, Amount, and Total.

| # | Unallocated | Posted Date | Payment Date | Appointment | Line Item | Provider | Payment Method | Type | Notes | Amount | Total |
|----|-------------|--------------|--------------|--------------------|-----------|----------|----------------|--------|-------|----------|-------|
| 0 | \$50.00 | May 9, 2023 | May 9, 2023 | 4/19/2022 12:00AM | | | Cash | Credit | | \$50.00 | |
| 2 | \$0.00 | Dec 18, 2020 | Dec 18, 2020 | | | | Cash | Credit | | \$170.00 | |
| 12 | \$5.00 | Dec 18, 2020 | Dec 18, 2020 | 11/19/2020 11:00AM | | | Cash | Credit | | \$20.00 | |
| 1 | \$0.00 | Oct 21, 2020 | Oct 21, 2020 | | | | Cash | Credit | | \$75.00 | |
| 4 | \$125.00 | Oct 21, 2020 | Oct 21, 2020 | | | | Cash | Credit | | \$150.00 | |
| 4 | \$20.00 | Oct 21, 2020 | Oct 21, 2020 | | | | Cash | Credit | | \$25.00 | |

5. To add a payment, press the green + Add button

The screenshot shows the 'Patient Payments' interface. At the top, there are tabs for 'Patient Payments', 'Payments', 'Line Items', 'Logs', 'Statements', and 'Balance'. Below the tabs, there are search and filter options including 'Patient', 'From', 'To', 'Filter by Range' (with dollar signs), and 'Provider: All'. There are also checkboxes for 'Simple: On', 'Condensed: On', and 'Internal: Off', and an 'Update' button. A summary table shows: Total Paid (\$490.00), Allocated Payment (Paid to Appt) (\$290.00), Unallocated Payment (\$200.00), Statement Balance (\$100.00), and Total Balance (-\$115.00). Below this is a 'Print/Export' dropdown menu with a green '+ Add' button highlighted by a red arrow. The main table lists individual payments with columns for #, Unallocated, Posted Date, Payment Date, Appointment, Line Item, Provider, Payment Method, Type, Notes, Amount, and Total. A legend at the bottom indicates that a red circle with a minus sign represents 'Unallocated' and a grey circle with a plus sign represents 'Fully Allocated'.

| | Total Paid | Allocated Payment (Paid to Appt) | Unallocated Payment | Statement Balance | Total Balance |
|--|------------|----------------------------------|---------------------|-------------------|---------------|
| | \$490.00 | \$290.00 | \$200.00 | \$100.00 | -\$115.00 |

| # | Unallocated | Posted Date | Payment Date | Appointment | Line Item | Provider | Payment Method | Type | Notes | Amount | Total |
|----|--------------------------|-------------|--------------|--------------|--------------------|----------|----------------|--------|-------|----------|-------|
| 0 | <input type="checkbox"/> | \$50.00 | May 9, 2023 | May 9, 2023 | 4/19/2022 12:00AM | | Cash | Credit | | \$50.00 | |
| 2 | <input type="checkbox"/> | \$0.00 | Dec 18, 2020 | Dec 18, 2020 | | | Cash | Credit | | \$170.00 | |
| 12 | <input type="checkbox"/> | \$5.00 | Dec 18, 2020 | Dec 18, 2020 | 11/19/2020 11:00AM | | Cash | Credit | | \$20.00 | |
| 1 | <input type="checkbox"/> | \$0.00 | Oct 21, 2020 | Oct 21, 2020 | | | Cash | Credit | | \$75.00 | |
| 4 | <input type="checkbox"/> | \$125.00 | Oct 21, 2020 | Oct 21, 2020 | | | Cash | Credit | | \$150.00 | |
| 4 | <input type="checkbox"/> | \$20.00 | Oct 21, 2020 | Oct 21, 2020 | | | Cash | Credit | | \$25.00 | |

Legend: | Unallocated | Fully Allocated |

6. From the popup menu titled **New Cash**, fill out the information and press **Add**:

- a. **Payment Date** - The date you are posting the payment
- b. **Appointment** - You can use the drop-down to assign the payment to a specific appointment, or if you leave it blank the payment will be added to the patient's unallocated payment section to be used at a future time/future visit.
- c. **Line Item** - If you select a specific appointment to apply the payment, you can specify which line item (CPT/HCPCS/Custom Code) the payment should be applied to. Any charges on the specific appointment will show in the drop-down.
- d. **Provider** - this line designates the provider for the specific payment. It can be left blank if you prefer.
- e. **Payment Method** - this is to identify the type of payment (cash, check, etc)
- f. **Type** - this is to specify the type of payment.
 - i. Credit - a payment on the account
 - ii. Refund - an amount is being refunded to the patient
 - iii. Correction - used to correct a previous posting error
 - iv. Copay/Coinsurance - used to identify the payment as a copay/coinsurance
 - v. Other - used for situations not specifically mentioned above
 - vi. **Notes** - This section is used to document check/money order numbers or any other details about the payment that could be useful later. The information listed here can come in handy if any research is needed in the future regarding the payment.

New Cash ×

Payment Date

Appointment

Line Item

Provider

Payment Method

Type

Notes

Amount \$

Receipt

Email Receipt

Text Receipt

