

DrChrono EHR features that work with in-house payments and payment partners

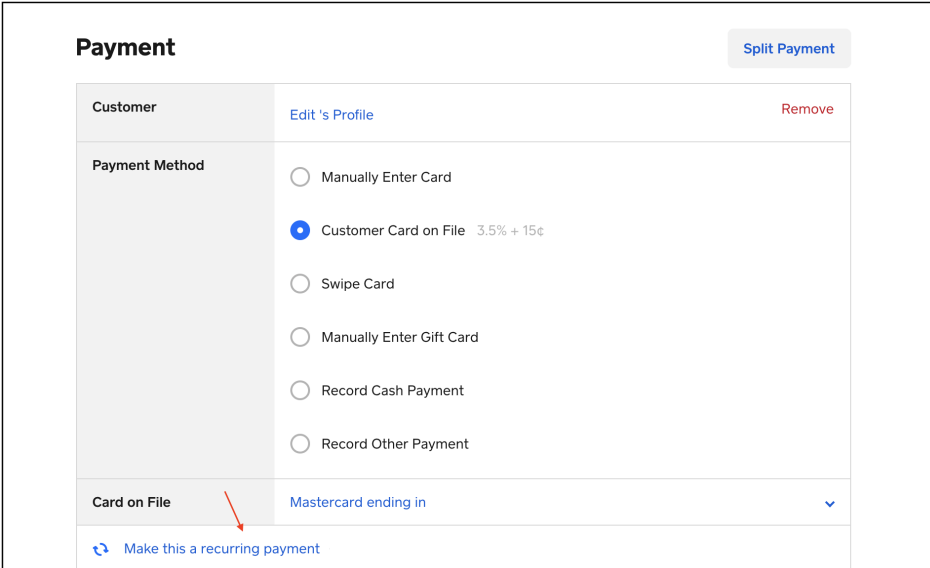
Last modified on 02/27/2025 11:43 am EST

You can use some of DrChrono's tools to facilitate the process of automating adding charges to an appointment. You can use appointment and billing profiles to set up charges for scheduled appointments. Appointment and billing profiles in conjunction with recurring appointments can be used to set up recurring charges.

- [Appointment Profiles](#)
- [Billing Profiles](#)
- [Connecting Billing and Appointment Profiles](#)
- [Recurring Appointments](#)

Note: Using appointment and billing profiles and/or recurring appointments will not automatically charge the patient. The payment will still need to be documented/processed manually in DrChrono or through a payment partner. However, the charges will be listed, saving time in the process.

Square Only Features Within the [Square](#) dashboard you can set up recurring payments/charges. However, these charges/payments **will not sync** back to your DrChrono account. The payments must be manually entered in DrChrono in the appointment payment window or patient payments menu described above to accurately reflect the balances.



The screenshot shows a 'Payment' form with a 'Split Payment' button in the top right. The form is divided into sections: 'Customer' with 'Edit 's Profile' and 'Remove' links; 'Payment Method' with radio buttons for 'Manually Enter Card', 'Customer Card on File 3.5% + 15¢' (selected), 'Swipe Card', 'Manually Enter Gift Card', 'Record Cash Payment', and 'Record Other Payment'; and 'Card on File' with a dropdown menu showing 'Mastercard ending in'. A red arrow points to the 'Card on File' section. At the bottom, there is a link 'Make this a recurring payment' with a refresh icon.

If you are looking for a more end-to-end solution for patient payments, check out our integrated patient collections

partner **ClearGage (CG)**. The software allows for more extensive patient receivables functionality in a virtual setting.

Some helpful features of CG are automatic payments, the ability to notify patients about the amounts they owe (real-time, as well as outstanding balances), the ability to text patients their bills, the ability to charge patients via text, and the ability for patients to set up monthly installment payment plans.

Familiarize yourself with ClearGauge on our [partner page](#).
