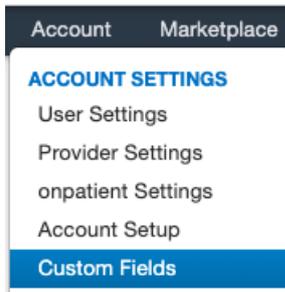


# How to create a Custom Patient Payment Type

Last modified on 02/24/2026 3:12 pm EST

If you would like to create a custom patient payment type such as a coupon, flex spending card, etc, you can do so by following the steps given below.

1. Go to **Account > Custom Fields**.



2. Select **Patient Payment Types** on the left of the screen.

Appointment Fields
Appointment Profiles
Appointment Statuses
Appointment Templates
Billing Profiles
Billing Statuses
Custom Adjustment Code
Eligibility Groups
Eligibility Profiles
Follow-Up Settings
Insurance Plan Names
Patient Demographics
Patient Flag Types
Patient Payment Types

3. Select Add New Type

Custom Patient Payment Types

Reserved Payment Types: American Express, Amex, CHCK, CRDT, Cash, Check, Credit Card, DBIT, DISC, Debit, Discover, MSTR, Mastercard, ONPT, OTHR, Other, PTPA, Patient Payments, SQR1, SQRE, Square, Square (Legacy), Visa, onpatient.

Name	Description	Appointments	Updated	Created
Care Credit		0	Jan 8, 2020	Jan 8, 2020

Archived

Name	Description	Archived	Created
Annual Fee		Sep 10, 2020	Aug 9, 2019

#### 4. Select a name and hit Save

Create Custom Patient Payment Type

Name: Coupon

Description:

Save Cancel

Once created, you can select this as a payment type while posting patient payments.

### From the appointment window:

1. Go into the **Appointment** and press the **Billing** tab. Select the **+** to post payment.

**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** [Dropdown] | **HCFA Box 10 - Is patient's condition related to:**

ICD Version: ICD-10

Primary Insurer: - Default -

Secondary Insurer: - Default -

Patient Payment: \$ 20.00 [ + ] [ Receipt ]

Pre Authorization Approval: [Text Box]

Referral #: [Text Box]

Payment Profile: Insurance

Billing Profile: [Dropdown] [ + ]

Billing Pick List: Choose Codes from Pick List

Diagnosis Pick List: Choose Codes from Pt Problems

Employment: No

Auto Accident: No

Other Accident: No

Onset Date Type: Onset of Current Symptoms o

Onset Date: [Text Box]

Other Date Type: - Other Date Type -

Other Date: [Text Box]

2. Select the Custom Payment Option.

**New Cash**

Payment Date: [Text Box]

Appointment: [Text Box]

Line Item: -Auto Allocate-

Provider: [Text Box]

Payment Method: [Dropdown] (Open menu: - Select Type -  
 ✓ Cash  
 Check  
 Credit Card  
 Square  
 Coupon\_spring)

Type: [Text Box]

Notes: [Text Box]

Amount: \$ [Text Box]

**Receipt**

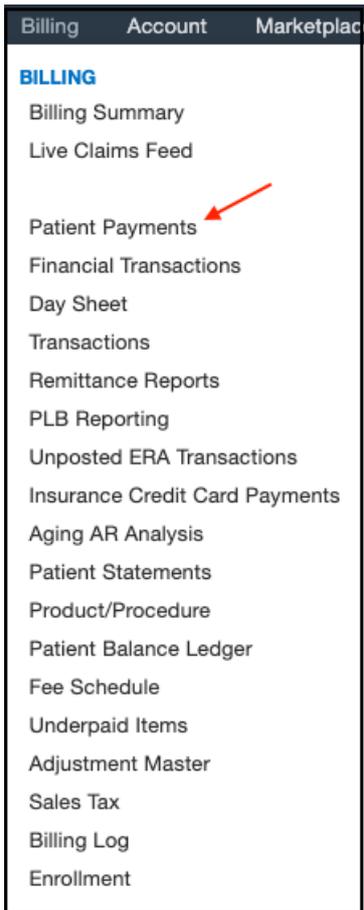
Email Receipt:

Text Receipt:

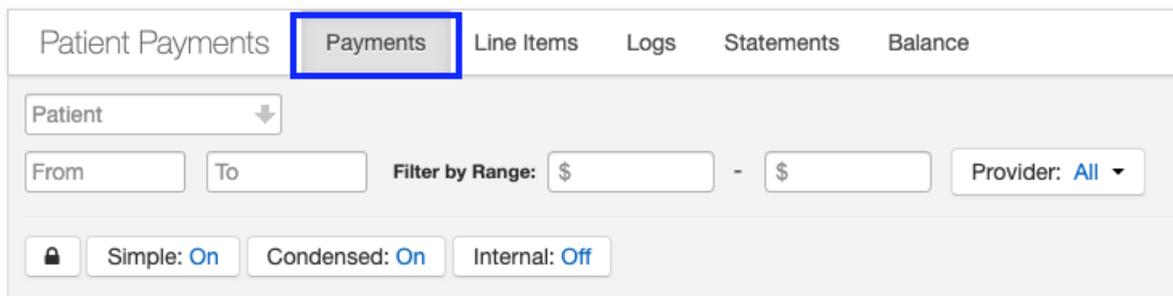
Cancel | Add

**From the patient payment window:**

1. Navigate to Billing > Patient Payments



2. Ensure you are on the Payment tab, and then select your patient



3. Select + Add

Patient Payments    Payments    Line Items    Logs    States

From    To    Filter by Range: \$ - \$

Simple: **On**    Condensed: **On**    Internal: **Off**

Total Paid	Allocated Pa
\$175.00	

Print/Export ▾    **+ Add**

#	Unallocated	Posted Date	Payment Date
▶ 1	\$175.00	Apr 14, 2022	Apr 14, 2022

4. Your newly created custom patient payment type will be listed under the payment method.

**New Cash** [x]

Payment Date:

Appointment:

Line Item:

Provider:

Payment Method:

Type:

Notes:

Amount:

Cancel    Add

- ✓ - Select Type -
- DrChrono Payments
- Cash
- Check
- Debit
- Credit Card
- American Express
- Visa
- Mastercard
- Discover
- onpatient
- Other
- Credit from previous system
- Coupon**