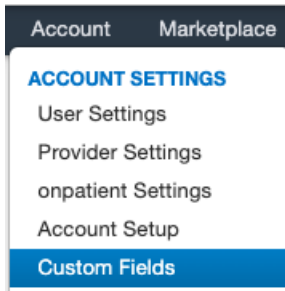


How to create a Custom Patient Payment Type

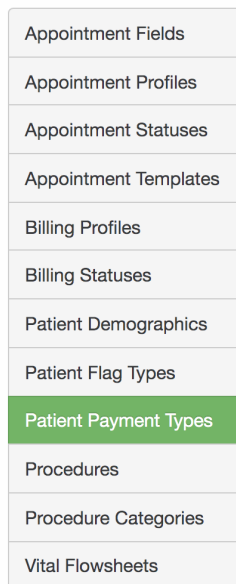
07/08/2024 7:57 pm EDT

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. Click on **Patient Payment Types** on the left of the screen.



3. Click **Add New Type**

Schedule Clinical Patients Reports Billing Account Help Search \$ 21 6 +

Appointment Fields
Appointment Profiles
Appointment Statuses
Appointment Templates
Billing Profiles
Billing Statuses
Patient Demographics
Patient Flag Types
Patient Payment Types
Procedures
Procedure Categories
Vital Flowsheets

Custom Patient Payment Types + Add New Type

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	Edit Archive

Archived

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

4. Select a name and hit Save

Schedule Clinical Patients Reports Billing Account Help Search \$ 21 6 +

Appointment Fields
Appointment Profiles
Appointment Statuses
Appointment Templates
Billing Profiles
Billing Statuses
Patient Demographics
Patient Flag Types
Patient Payment Types
Procedures
Procedure Categories
Vital Flowsheets

Custom Patient Payment Types + Add New Type

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	Edit Archive

Archived

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

Create Custom Patient Payment Type

Name:

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 click the **Billing** tab. Select the + to post payment.

Schedule Appointment

Appointment **Billing** Eligibility Vitals Growthcharts Flags Log Comm. Revisions Custom Data MU Helper

Patient SuperBill Clinical Note Billing Details Other Forms

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

ICD Version: ICD-10 [Dropdown]

Patient Payment: \$ 0 [Input] + [Button] ←

Pre Authorization Approval: FAC001 [Input]

Referral #: [Input]

Payment Profile: Cash [Dropdown]

Billing Profile: New Pati [Dropdown] + [Button]

Billing Pick List: Choose Codes from Pick List [Button]

Diagnosis Pick List: Choose Codes from Pt Problems [Button]

Employment: No [Dropdown]

Auto Accident: No [Dropdown]

Other Accident: No [Dropdown]

Onset Date Type: Onset of Current Symptoms o [Dropdown]

Onset Date: [Input]

Other Date Type: - Other Date Type - [Dropdown]

Other Date: [Input]

ICD-10 Codes [Find Diagnosis codes]

#	Code	Description
---	------	-------------

ICD-9 Codes to Convert [Find Diagnosis codes]

#	Code	Description
---	------	-------------

CPT Codes [Find CPT Procedure codes]

Code	Description	Price (\$)
1 99203	OFFICE/OUTPATIENT VISIT NEW	150.00

Modifiers: [Dropdown] [Dropdown] [Dropdown] [Dropdown]

Quantity/Minutes: 1.00 [Input]

2. Select the Custom Payment Option.

Schedule Appointment

Appointment **Billing** Eligibility Vitals Growthchart

Billing Status [Dropdown]

ICD Version: ICD-10 [Dropdown]

Patient Payment: \$ 0 [Input] + [Button]

Pre Authorization Approval: FAC001 [Input]

Referral #: [Input]

Payment Profile: Cash [Dropdown]

Billing Profile: New Pati [Dropdown] + [Button]

Billing Pick List: Choose Codes from Pick List [Button]

Diagnosis Pick List: Choose Codes from Pt Problems [Button]

ICD-10 Codes [Find Diagnosis codes]

#	Code	Description
---	------	-------------

ICD-9 Codes to Convert [Find Diagnosis codes]

#	Code	Description
---	------	-------------

Quantity/Minutes: 1.00 [Input]

New Cash

Payment Date: 09/10/2020 [Input]

Appointment: 9/10/2020 02:00PM (\$150.00) [Dropdown]

Line Item: -Auto Allocate- [Dropdown]

Provider: Martvna Somerville [Dropdown]

Payment Method: [Dropdown]

Type: **Cash** [Dropdown]

Notes: [Input]

Amount: [Input]

Code	Applied	Payment Type
99203	\$	credit

[Add] [Cancel]

From the patient payment window:

1. Navigate to Billing > Patient Payments

BILLING

Billing Summary

Live Claims Feed

Patient Payments

Day Sheet

Transactions

Remittance Reports

Unmatched ERAs

Insurance Credit Card Payments

Accounts Receivable

Patient Statements

Product/Procedure

Patient Balance Ledger

Fee Schedule

Underpaid Items

Adjustment Master

Sales Tax

Billing Log

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

The screenshot shows the 'Patient Payments' interface. At the top, there are tabs for 'Patient Payments', 'Payments', 'Line Items', 'Logs', 'Statements', and 'Balance'. The 'Payments' tab is highlighted with a blue border. Below the tabs, there is a 'Patient' dropdown menu. Underneath, there are 'From' and 'To' input fields, a 'Filter by Range' section with two dollar sign (\$) input fields and a minus sign (-), and a 'Provider: All' dropdown menu. At the bottom, there are three toggle buttons: 'Simple: On', 'Condensed: On', and 'Internal: Off'.

3. Select + Add

The screenshot shows the 'Patient Payments' interface with the 'Payments' tab selected. Below the filter options, there is a table with a yellow header row. The table has two columns: 'Total Paid' and 'Allocated Pa'. The 'Total Paid' column contains the value '\$175.00'. Below the table, there is a 'Print/Export' dropdown menu and a green '+ Add' button highlighted with a blue border. Below the '+ Add' button, there is another table with a yellow header row and one data row. The header row has columns: '#', 'Unallocated', 'Posted Date', and 'Payment Date'. The data row has a red circle with the number '1' in the first column, a checkbox in the second column, the value '\$175.00' in the third column, and the date 'Apr 14, 2022' in the fourth column.

	Total Paid	Allocated Pa
	\$175.00	

#	Unallocated	Posted Date	Payment Date
1	<input type="checkbox"/>	\$175.00	Apr 14, 2022

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

New Cash ×

Payment Date	<input type="text"/>
Appointment	<input type="text" value=""/>
Line Item	<input type="text" value="-No Line Item-"/>
Provider	<input type="text" value=""/>
Payment Method	<input type="text" value="✓ - Select Type -"/>
Type	DrChrono Payments
Notes	Cash
Amount	Check
	Debit
	Credit Card
	American Express
	Visa
	Mastercard
	Discover
	onpatient
	Other
	Credit from previous system
	Coupon