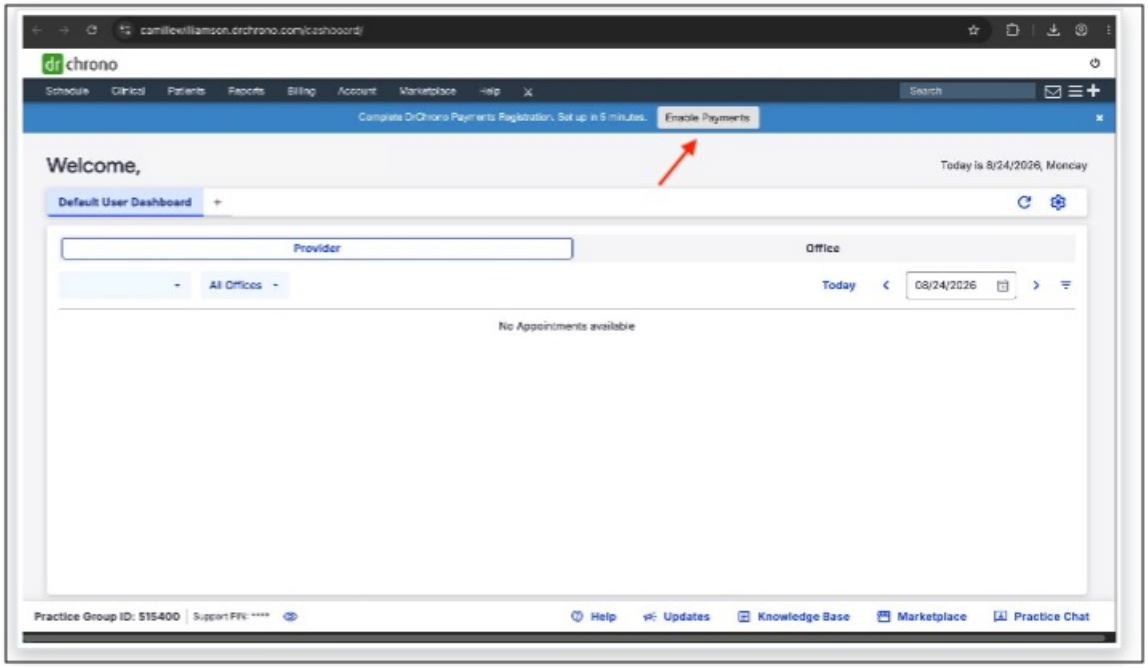
DrChrono Payments: How to set up your account

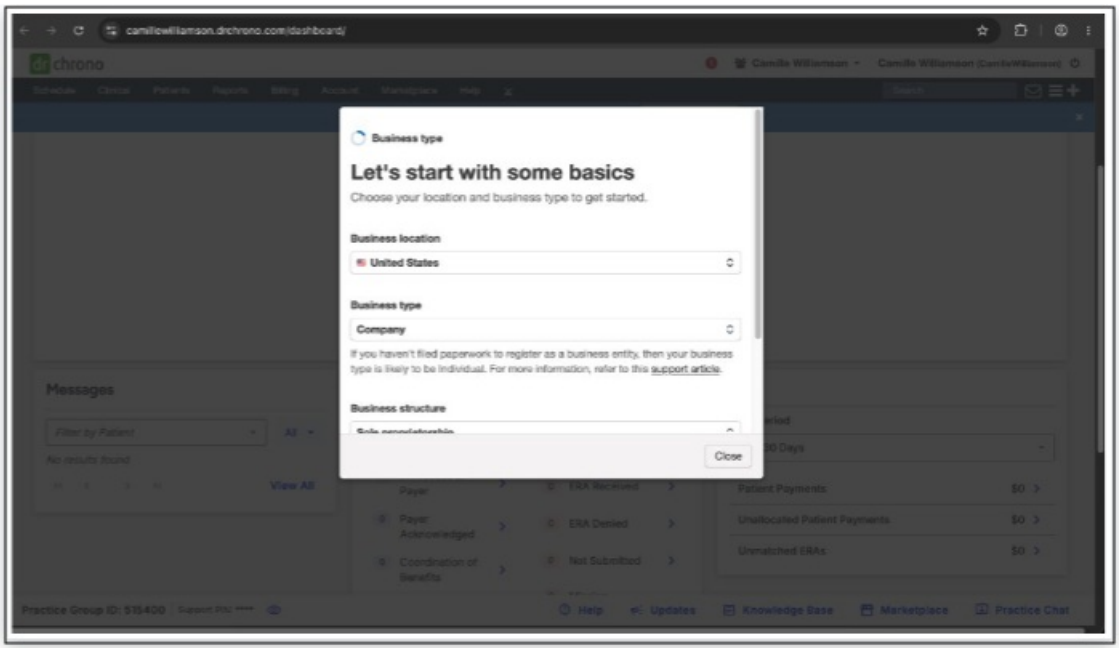
Last modified on 09/30/2026 3:32 pm EDT

Setting up your DrChrono Payment account is easy and can be done through your DrChrono account.

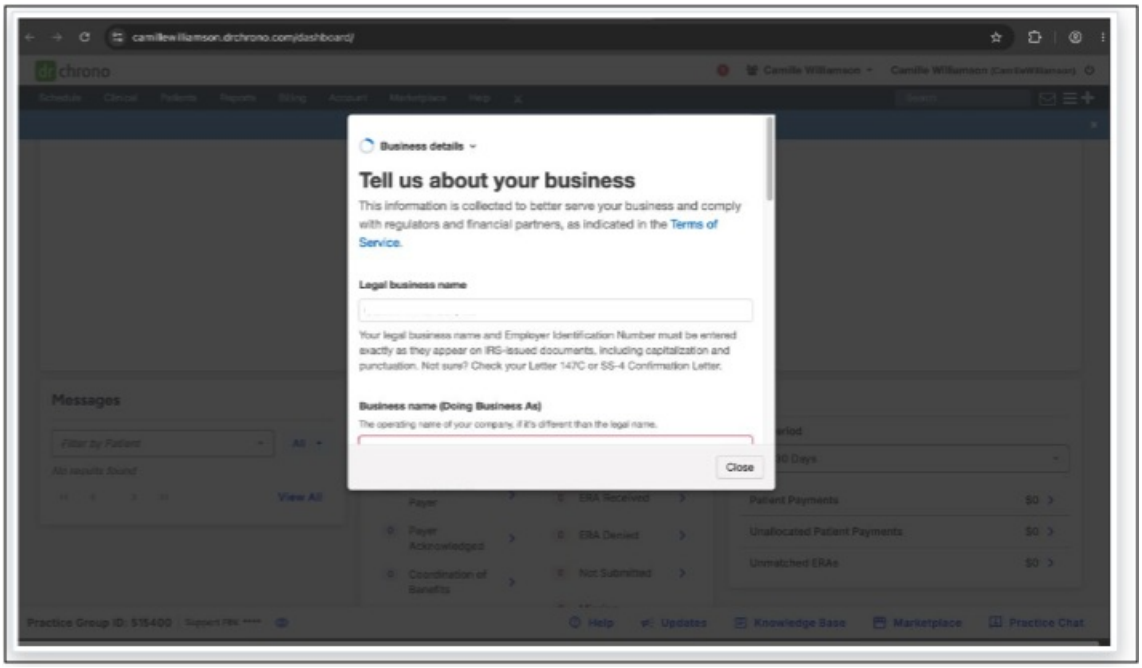
1. Navigate to **Account > Account Settings > Patient Payments** tab.
2. Press **Enable Payments** on the top blue toolbar. This will start the enrollment process.



3. Enter the business location and type (e.g., Sole proprietorship, LLC, Corporation). Stripe suggests selecting individual if you are not formally an entity.



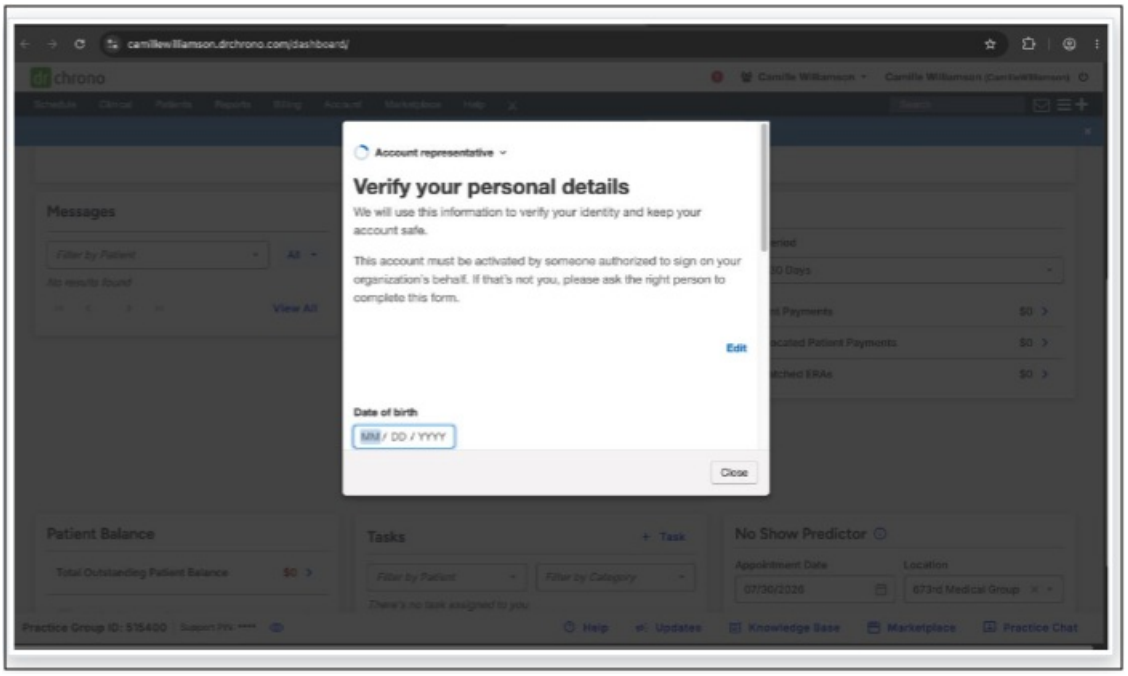
4. Enter the legal business name and EIN. They must match IRS-issued documents exactly - including capitalization and punctuation. Refer to IRS Letter 147C or SS-4 Confirmation Letter if you are unsure. Doing Business As (DBA) is optional. It is only needed if it differs from the business's legal name.



Small formatting mismatches vs. IRS records (e.g., a missing comma) can trigger verification failures

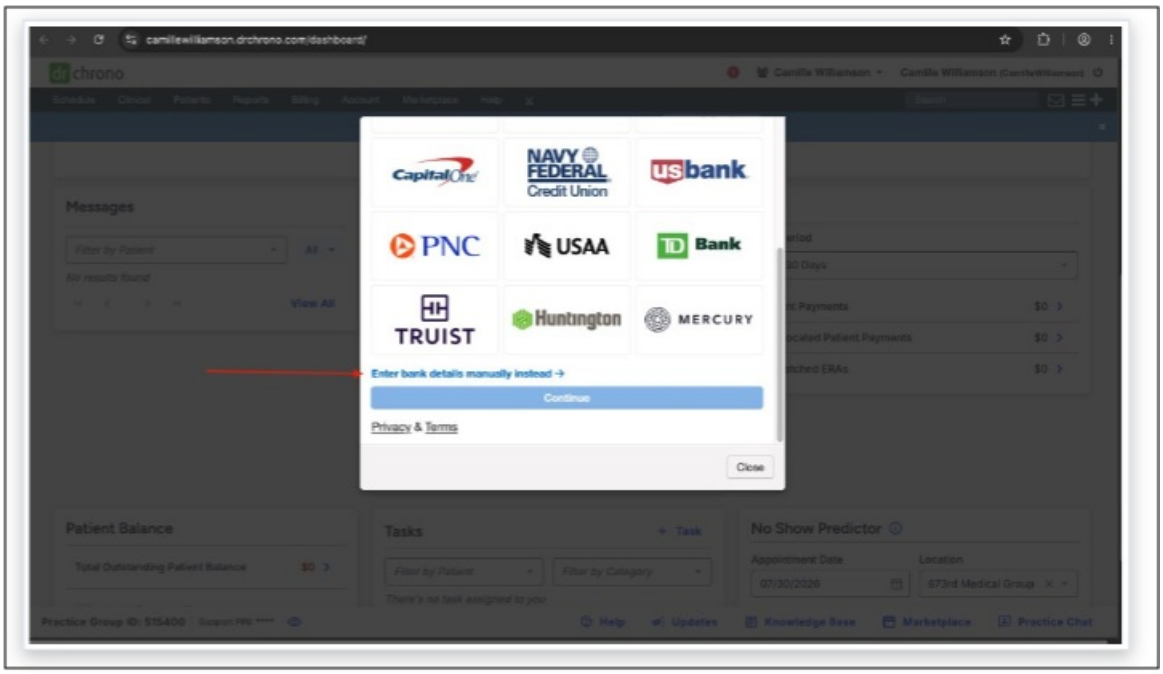
5. Someone authorized to sign on the organization's behalf must complete the Verify your personal details section. It will require the representative's legal name, date of birth, home address, and Social Security

number (SSN) or the last 4 digits.

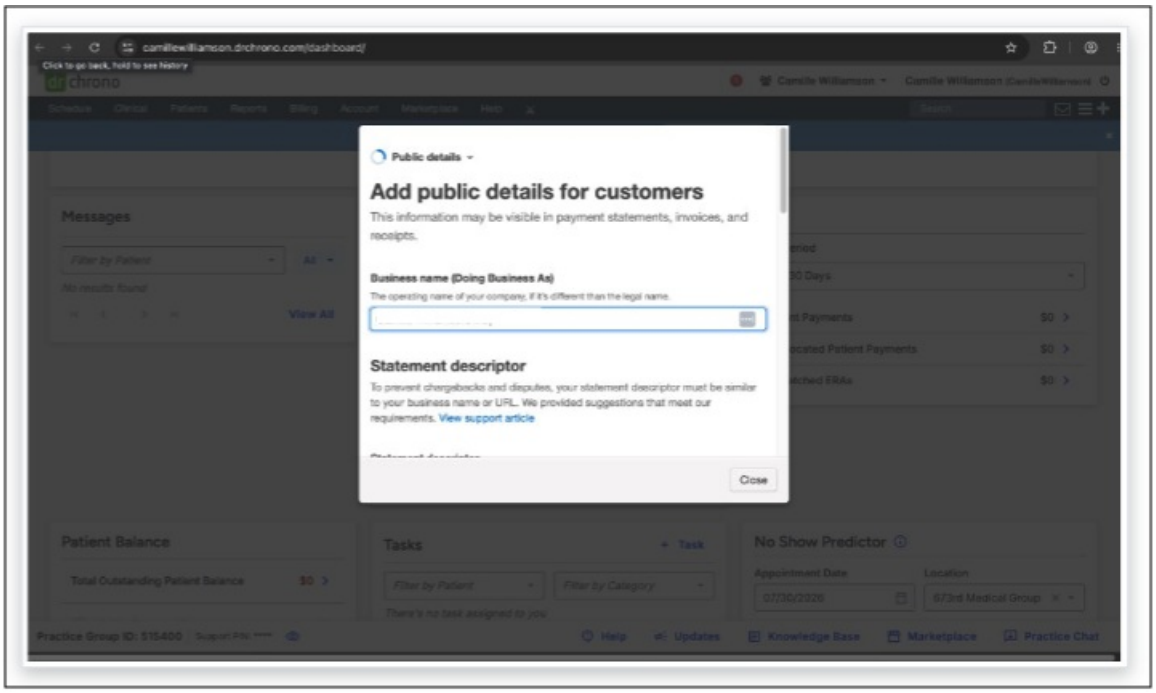


> Using an office manager's or assistant's info instead of an owner's or executive's can delay approval - confirm authorization before starting this step.

6. Connect your Bank Account. Utilizing the "Enter bank details manually instead" option is the fastest, most reliable path to connect your account and avoid instant-verification hiccups. Manual entry requires a checking account - savings accounts are not accepted. Instant verification can be completed via Plaid if you prefer.

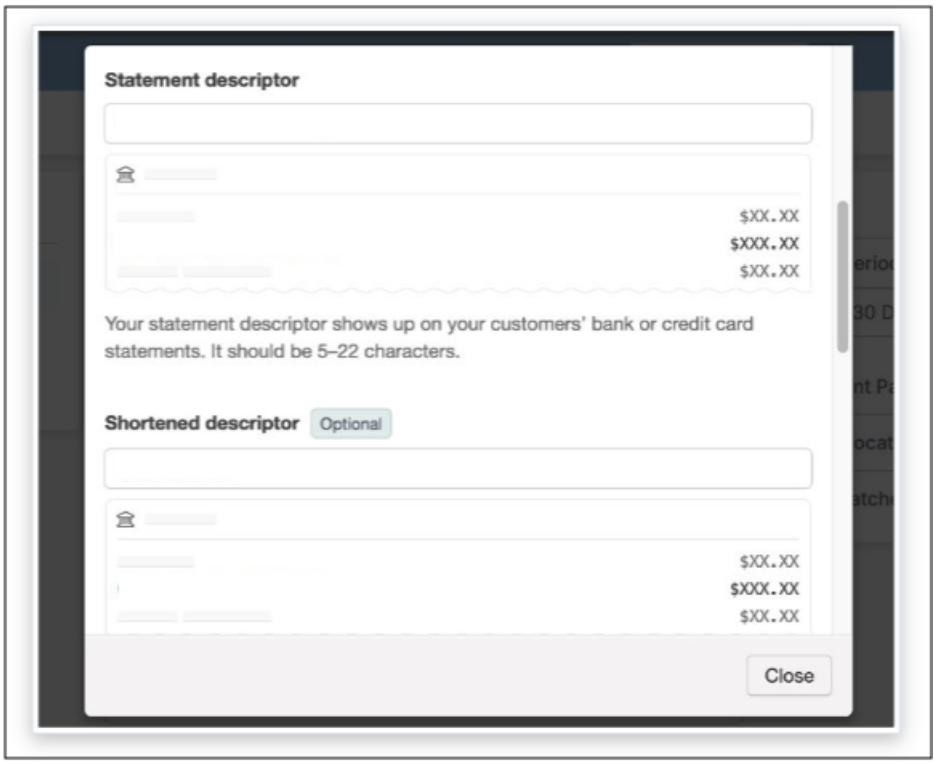


7. The Doing Business As (DBA) name and statement descriptor entered here will appear on customer payment statements, invoices, and receipts. If left blank, it will default to the legal business name. Information entered on this screen is visible to customers/patients.

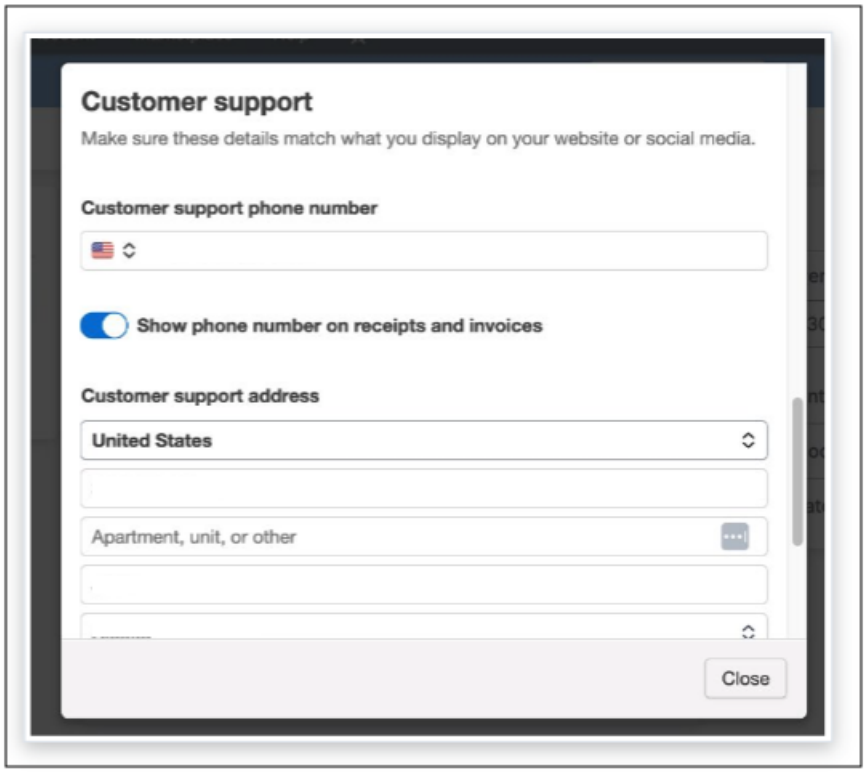


8. Set a Compliant Statement Descriptor - must be between 5 and 22 characters. An optional shortened descriptor can be used when a full one exceeds 22 characters. This is how the charge will appear on the patient's bank or credit card statement.

   Descriptors that are too vague or resemble unrelated businesses increase chargeback and dispute risk - keep it clearly recognizable to avoid issues.

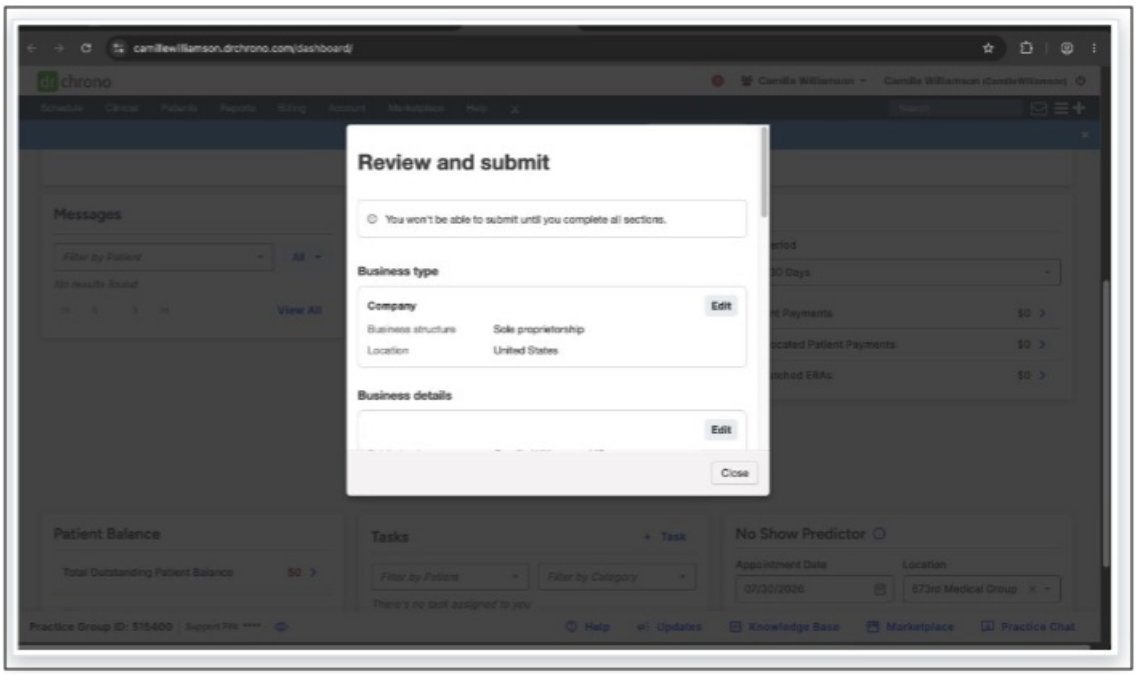


9. Add Customer Support Contact Information - such as a phone number and address that will show on the patient's invoices and receipts. It should match what's listed on the provider's website or social media account. The toggle switch will allow the phone number to appear on the receipt.

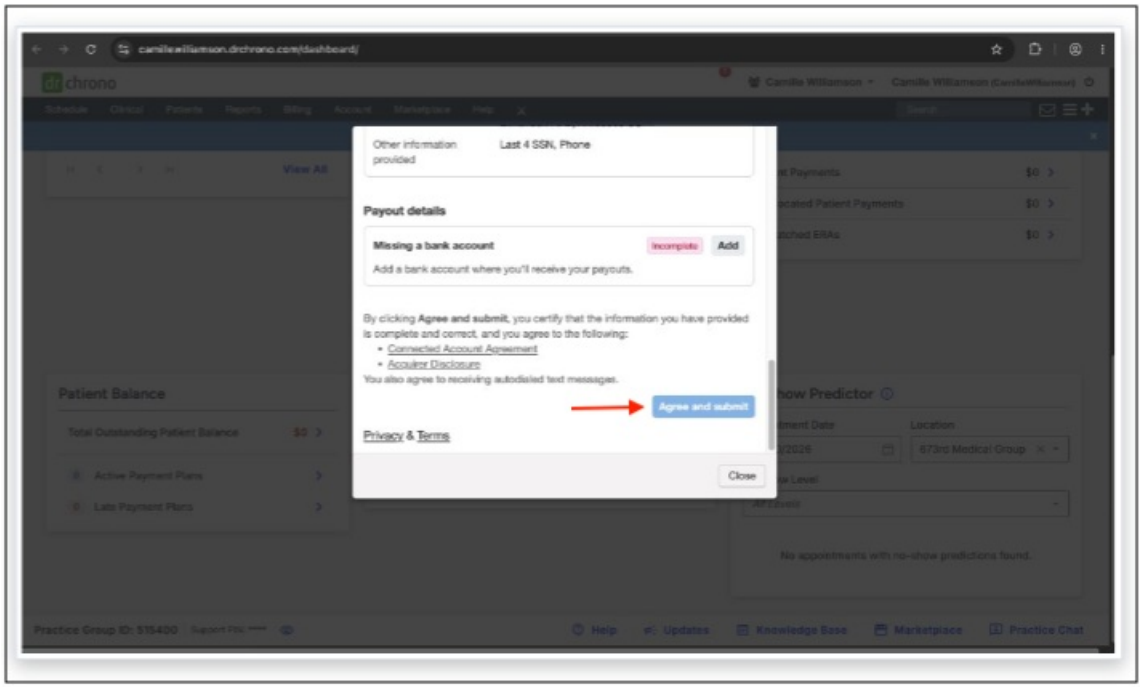


10. Review each section. Any incomplete items will be marked as such. The Edit feature will take you to the

appropriate section to review and update. Stripe will not allow the submission until each section is marked as complete.



11. Once each section is labeled Complete, press Agree and Submit. This confirms that all information listed is correct and accepts the Stripe Connected Account Agreement.



12. Stripe will review the submission and often approve it within minutes or the same day. If they need additional information, they will reach out via the Stripe portal.