

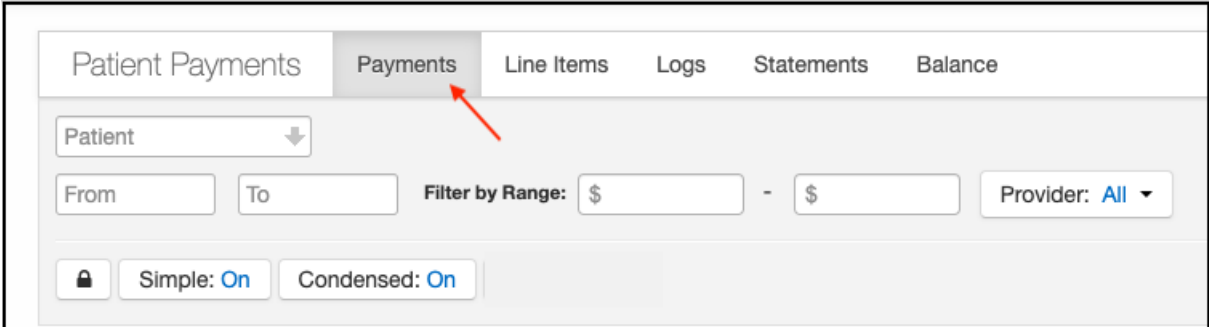
DrChrono Payments: Processing a patient payment on the web

Last modified on 04/22/2026 2:37 pm EDT

DrChrono is happy to offer your practice a simple, efficient, and convenient way to collect patient payments.

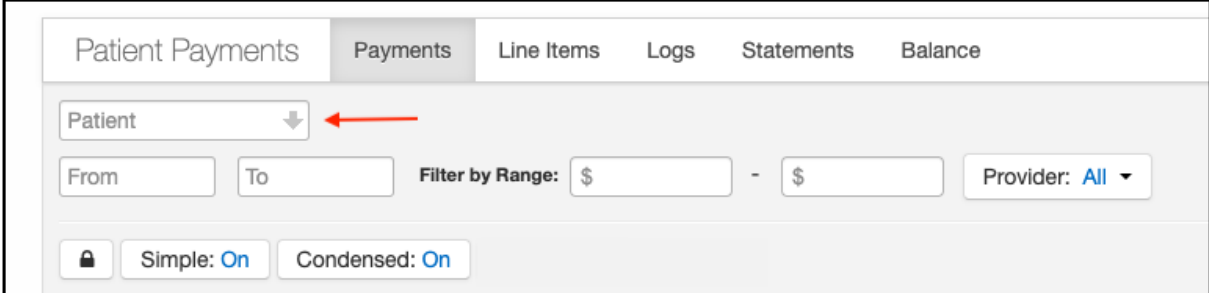
After you set up your account with DrChrono Payments, you are ready to process a payment.

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



The screenshot shows the DrChrono Payments interface. At the top, there are several tabs: "Patient Payments", "Payments", "Line Items", "Logs", "Statements", and "Balance". The "Payments" tab is highlighted in grey, and a red arrow points to it. Below the tabs, there is a "Patient" dropdown menu. Underneath, there are "From" and "To" input fields, followed by a "Filter by Range:" label and two dollar sign (\$) input fields separated by a hyphen. To the right of these is a "Provider: All" dropdown menu. At the bottom, there are three buttons: a lock icon, "Simple: On", and "Condensed: On".

2. Select the patient who is making a payment



The screenshot shows the DrChrono Payments interface, similar to the previous one. The "Payments" tab is still selected. A red arrow points to the "Patient" dropdown menu, indicating that a patient should be selected from this menu. The rest of the interface, including the "From" and "To" fields, "Filter by Range:" fields, "Provider: All" dropdown, and "Simple: On" and "Condensed: On" buttons, remains the same.

3. Press the green + **Add** button

Patient Payments Payments Line Items Logs Statements Balance

Emily (Demo) Henry ▾

From To Filter by Range: \$ - \$ Provide

Simple: **On** Condensed: **On**

	Total Paid	Allocated Payment (Paid to Appt)
Emily (Demo) Henry		

Print/Export ▾ **+ Add** ←

4. Under Payment Method, select DrChrono Payments.

New Cash

Payment Date

Appointment

Line Item

Provider

Payment Method ←

Type

Notes

Amount \$

Cancel Add

New Cash

Payment Date

Appointment

Line Item

Provider

Payment Method

Type

Notes

Amount

Pay with card

PLEASE NOTE - Please ensure you are selecting DrChrono Payments. Selecting any other option will result in the credit card **not** actually being charged. The payment method type listing can be customized for your office. This article can show you how.

- Once you select DrChrono Payments, additional fields will open. They will give you the option to swipe the patient's credit card or enter the information manually.

The screenshot shows a 'New Cash' form with the following fields and options:

- Provider: [Dropdown]
- Payment Method: [Dropdown]
- Type: Credit [Dropdown]
- Notes: [Text Area]
- Amount: \$ [Input] **Required**
- Card on File: [Dropdown]
- Buttons: **Swipe Card** and **Manually Enter Card**
- Checkbox: Save card information
- Bottom Buttons: **Cancel** and **Pay with card**

- You will also have the option of saving the card information for future payments. The information would be available in the drop-down titled **Card on File**. You do not have to select this option for the payment to process.

This screenshot is identical to the previous one, but with a red arrow pointing to the Save card information checkbox.

You can swipe the patient's card using available readers ([catalog](#)) or manually enter it. If you choose to manually enter the information, you will be asked for the Cardholder's name, Credit Card number, Expiration date (mm/yy), CVV Security Code, and Zip/Postal code.

- After processing, it will be listed as Payment Method **PSMP**.

#	<input type="checkbox"/> Unallocated	Posted Date	Payment Date	Appointment	Line Item	Provider	Payment Method	Type	Notes	Amount	Total	
▶	<input checked="" type="checkbox"/>	\$12.00					PSMP	Credit	0	\$12.00		Receipt Refund

If needed, you can print a receipt for the patient by clicking on the **receipt button** on the right side of the screen.
