

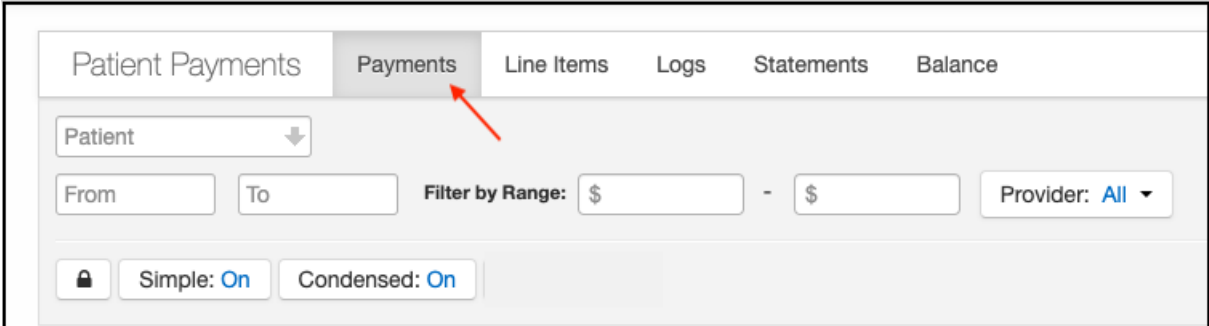
DrChrono Payments: Processing a patient payment on the web

Last modified on 02/21/2025 2:17 pm EST

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

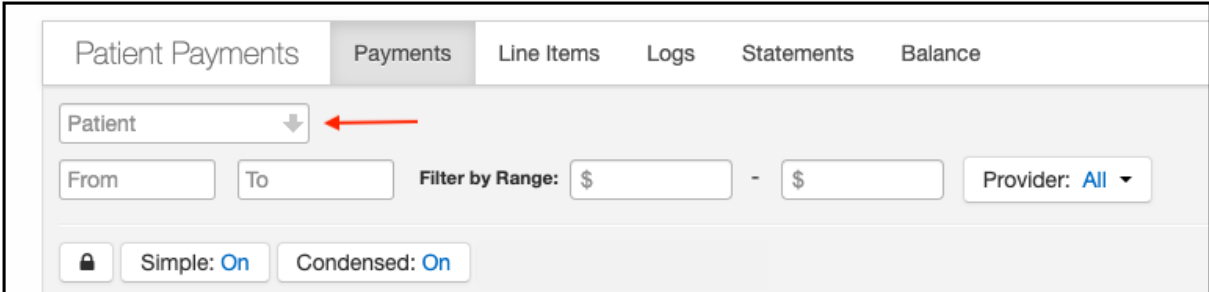
After you set up your account with DrChrono Payments, you are ready to process a payment.

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 with a red arrow. 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 minus sign (-). To the right of these is a "Provider: All" dropdown menu. At the bottom, there is a lock icon, a "Simple: On" button, and a "Condensed: On" button.

2. Select the patient who is making a payment



This screenshot is identical to the previous one, but with a red arrow pointing to the "Patient" dropdown menu, indicating the next step in the process.

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, you will have the option to 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

5. 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 'New Cash' form includes 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**, **Manually Enter Card**
- Checkbox: Save card information
- Bottom Buttons: **Cancel**, **Pay with card**

6. 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 highlights the Save card information checkbox with a red arrow.

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.

7. 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	ⓘ	\$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.