

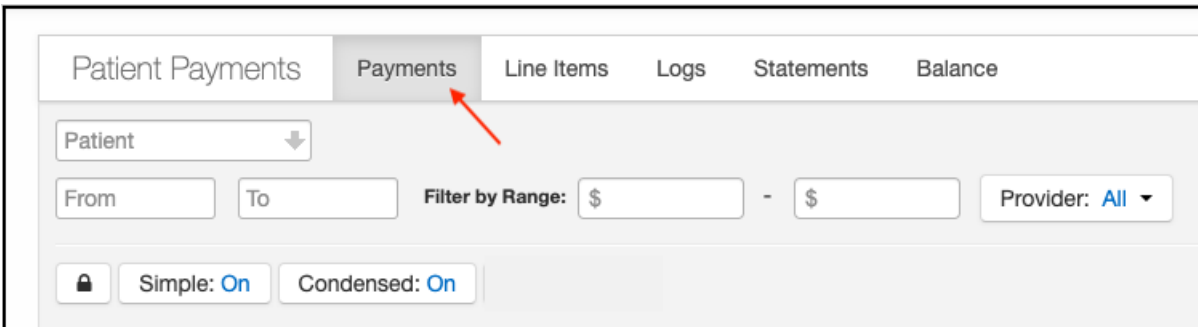
DrChrono Payments: Processing a patient payment on the web

Last modified on 05/29/2026 4:36 pm EDT

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

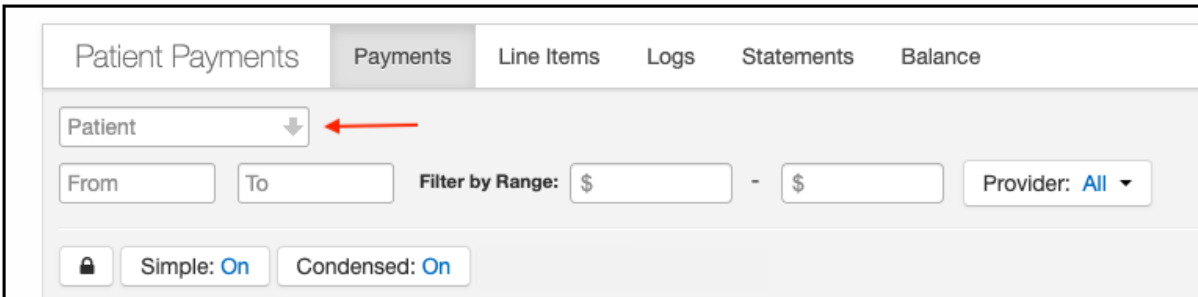
After you set up your account with DrChrono Payments, you are ready to process a payment.

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 minus sign. To the right 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



The screenshot shows the DrChrono Payments interface, similar to the previous one. The "Payments" tab is still selected. The "Patient" dropdown menu is now open, and a red arrow points to it. 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 - 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.

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
- 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	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.

