

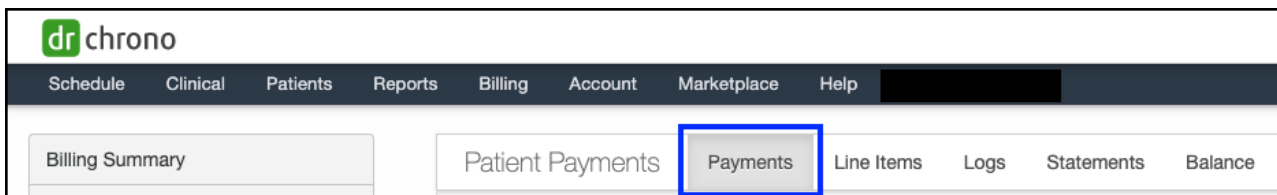
DrChrono Payments: Processing a patient payment on the web

09/18/2024 10:15 am EDT

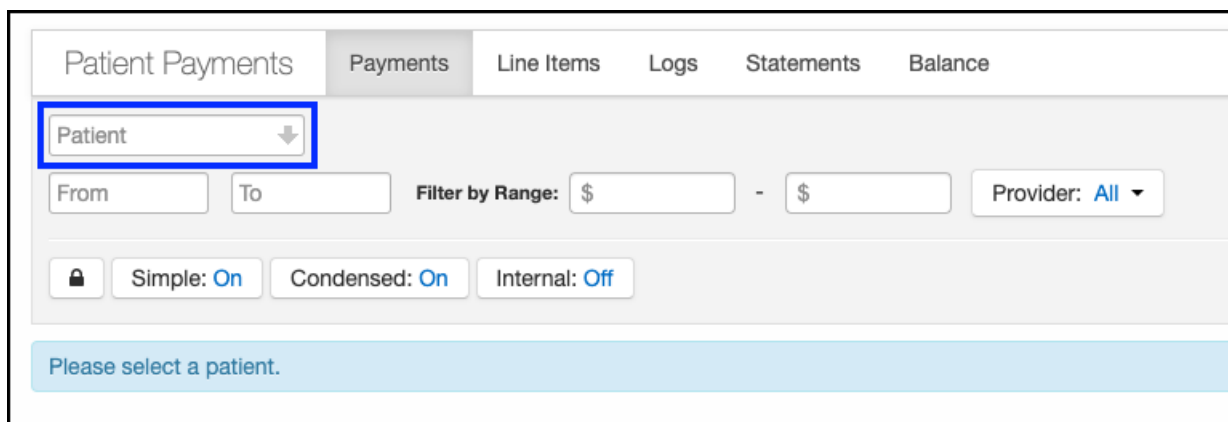
DrChrono is happy to offer your practice a simple, efficient, and convenient way to collect patient payments.

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

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



2. Select the patient who is making a payment



3. Click 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** Internal: **Off**

	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 - Select Type - ▾ 

Type Credit ▾

Notes

Amount \$

Cancel **Add**

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

- Payment Date:
- Appointment:
- Line Item:
- Provider:
- Payment Method: (dropdown menu is open showing options: Cash, Check, Debit, Credit Card, American Express, Visa, Mastercard, Discover)
- Type:
- Notes:
- Amount:

A 'Pay with card' button is visible at the bottom right of the form.

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

- Provider:
- Payment Method:
- Type:
- Notes:
- Amount: (Required)
- Card on File:

Buttons for 'Swipe Card' and 'Manually Enter Card' are located below the 'Amount' field. A checkbox for 'Save card information' is also present. 'Cancel' and 'Pay with card' buttons are at the bottom right.

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.

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 type="checkbox"/>						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.