

DrChrono Payments: Processing a payment from the appointment screen

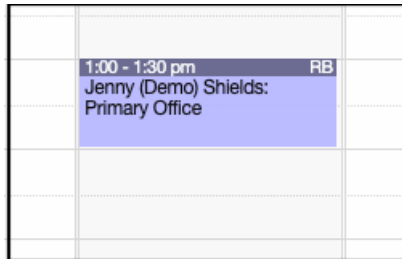
09/18/2024 10:48 am EDT

When your patient arrives for their appointment, you can easily collect and process their copay or other payment directly from the appointment/calendar.

All patient data listed in this article is sample data. This is not a real person or real patient data.

Here's how:

1. Navigate to the **calendar** and select the **patient's appointment**



2. Select the **Billing** tab

A screenshot of the 'Schedule Appointment' form in DrChrono. The 'Billing' tab is selected and highlighted with a red box. The form contains various fields for appointment details. At the bottom, there are buttons for 'Delete', 'Save & Close', 'Save', and 'Cancel'.

Schedule Appointment

Appointment | **Billing** | Eligibility | Vitals | Growthcharts | Flags | Log Comm. | Revisions | Custom Data | MU Helper

Type Appointment Video Visit Walk-in Transition of Care Referral

Provider: [Dropdown]
Supervising: - If different to provider - [Dropdown]
Patient: Jenny (Demo) Shields - 10/21/19 [Edit] [Add] [Refresh]
Reason: [Text Area]
Scheduled: [Time] Time [Dropdown]
Duration: 30 minutes Allow overlapping
Notes: [Text Area]
Consent Forms: HIPAA Data Use Agreement (default)

Billing: - If different to provider - [Dropdown]
Office: Primary Office [Dropdown] [Edit] [Add]
Profile: [Dropdown]
Eligibility Profile: [Dropdown]
Exam: Exam 1 [Dropdown]
Color: [Color Picker]
Status: [Dropdown]
0h 18m
 View Clinical Note
View All Appointments

Recurring Appointment A scheduled appointment cannot be converted to a recurring series.
 Arrange a Follow-up Reminder
 View Active Reminders:

Delete Save & Close Save Cancel

3. Click on the blue plus + next to Patient Payment

Schedule Appointment

Appointment | **Billing** | Eligibility | Vitals | Growthcharts | Flags | Log Comm. | Revisions | Custom Data | MU Helper

Institutional Claim

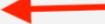
Patient SuperBill | Clinical Note | Billing Details | Other Forms

Billing Status [dropdown] **HCFA Box 10 - Is patient's condition related to:**

ICD Version: ICD-10 [dropdown]

Primary Insurer: - Default - [dropdown]

Secondary Insurer: - Default - [dropdown]

Patient Payment: \$ 0 [input] **+** [button] 

Pre Authorization Approval [input]

Referral # [input]

Payment Profile [dropdown]

Billing Profile [dropdown] **+** [button]

Billing Pick List: Choose Codes from Pick List

Diagnosis Pick List: Choose Codes from Pt Problems

Employment: No [dropdown]

Auto Accident: No [dropdown]

Other Accident: No [dropdown]

Onset Date Type: Onset of Current Symptoms o [dropdown]

Onset Date [input]

Other Date Type: - Other Date Type - [dropdown]

Other Date [input]

ICD-10 Codes [Find Diagnosis codes dropdown]

#	Code	Description
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ICD-9 Codes to Convert [Find Diagnosis codes dropdown]

#	Code	Description
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NDC Codes [Find NDC Codes dropdown]

NDC Code	Quantity	Units	Line Item
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CPT Codes [Find CPT Procedure codes dropdown]

Code	Description	Price (\$)
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HCPCS Codes [Find HCPCS Procedure codes dropdown]

Code	Description	Price (\$)
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Custom Codes [Find Custom Procedure codes dropdown]

Code	Description	Price (\$)
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Include note in EDI Billing: Custom NTE EDI Billing Note (a.k.a. HCFA/CMS-1500 Line 19) [input]

Delete **Save & Close** **Save** **Cancel**

4. A separate window will open where you can process the patient's payment.

New Cash

Payment Date [input]

Appointment [input]

Line Item [dropdown]

Provider [input]

Payment Method: DrChrono Payments [dropdown]

Type: Credit [dropdown]

Notes [input]

Amount: \$ [input]

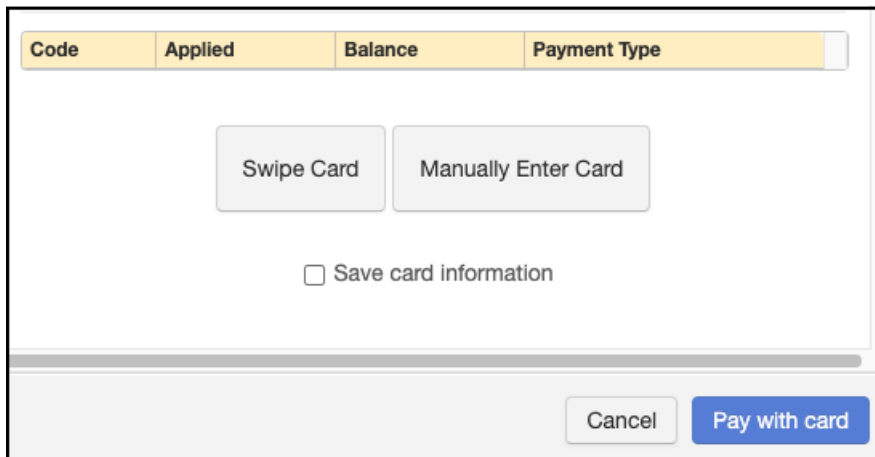
Code	Applied	Balance	Payment Type
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Cancel **Pay with card**

The Payment Date, Appointment, and Provider should automatically populate based on the information from the patient appointment you selected.

You will want to select "DrChrono Payments" from the Payment Method drop-down.

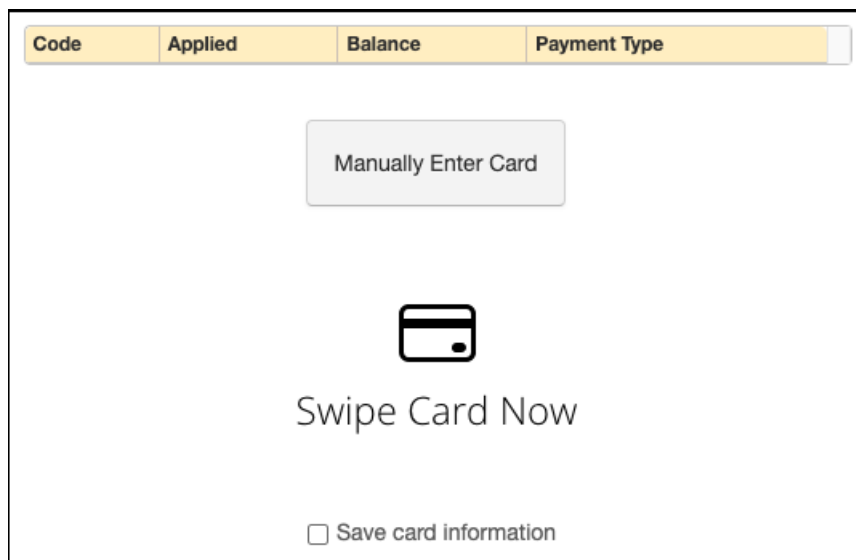
After entering the amount of the patient's payment (copay, deductible, cash pay, etc) in the Amount column, scroll down to select whether you will swipe the patient's credit card, or manually enter the information.



The screenshot shows a payment selection interface. At the top, there is a table with four columns: Code, Applied, Balance, and Payment Type. Below the table, there are two buttons: "Swipe Card" and "Manually Enter Card". Underneath these buttons is a checkbox labeled "Save card information". At the bottom right, there are two buttons: "Cancel" and "Pay with card".

Depending on which option you select, you will see one of two different screens.

Swipe Card -



The screenshot shows the "Swipe Card Now" screen. At the top, there is a table with four columns: Code, Applied, Balance, and Payment Type. Below the table, there is a button labeled "Manually Enter Card". In the center, there is a card icon and the text "Swipe Card Now". At the bottom, there is a checkbox labeled "Save card information".

Manually Enter Card -

New Cash ×

Cardholder Name *

Credit Card *

Expiration *

Security Code *

Cancel

Pay with card

Once the payment is processed, the system will post it to the appointment and allow you to print the patient a receipt.
