

DrChrono Payments: Processing a payment from the appointment screen

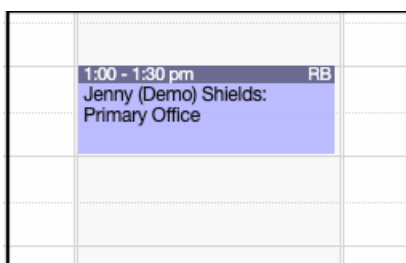
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When your patient arrives for their appointment, you can easily collect and process their copay or other payment directly from the appointment/calendar.

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 a web application. The 'Billing' tab is selected and highlighted in blue. The form contains various fields for appointment details. At the top, there are tabs for 'Appointment', 'Billing', 'Eligibility', 'Vitals', 'Growthcharts', 'Flags', 'Log Comm.', 'Revisions', 'Custom Data', and 'MU Helper'. Below the tabs, there are radio buttons for 'Appointment' (selected), 'Video Visit', 'Walk-in', 'Transition of Care', and 'Referral'. A warning message states: 'WARNING: This patient is pre-populated sample data.' and 'Patient Statement Balance: \$6409.32 Generate Statement'. The 'Primary Insurance' is listed as 'Aetna [80054]'. The 'Provider' and 'Supervising' fields are dropdown menus. The 'Patient' field is 'Marc (Demo) Alexander - 05/12/1' with a blue plus icon next to it. The 'Reason' field is empty. The 'Scheduled' field shows a time slot. The 'Duration' is '75 minutes' with a checked 'Allow overlapping' option. The 'Notes' field contains 'This is a demo appointment'. The 'Consent Forms' section has a checked box for 'HIPAA Data Use Agreement (default)'. On the right side, there are dropdown menus for 'Billing', 'Office' (Primary Office), 'Profile', 'Eligibility Profile', 'Exam' (Exam 1), 'Color', and 'Status' (> 24h). There are buttons for 'View Clinical Note' and 'View All Appointments'. At the bottom, there are buttons for 'Delete', 'Save & Close', 'Save', 'Save & Pay', and 'Cancel'. There are also checkboxes for 'Recurring Appointment', 'Arrange a Follow-up Reminder', and 'View Active Reminders'.

3. Press 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 **HCFA Box 10 - Is patient's condition related to:**

ICD Version ICD-10 Employment No

Primary Insurer - Default - Auto Accident No

Secondary Insurer - Default - Other Accident No

Patient Payment \$ 0 Copay: \$25.00 **+**

Pre Authorization Approval

Referral #

Payment Profile Insurance

Billing Profile **+**

Billing Pick List Choose Codes from Pick List

Diagnosis Pick List Choose Codes from Pt Problems

Onset Date Type Onset of Current Symptoms o

Onset Date

Other Date Type - Other Date Type -

Other Date

ICD-10 Codes Find Diagnosis codes

#	Code	Description
1	M81.0	Age-related osteoporosis without current pathological fracture

Custom Codes Find Custom Procedure codes

Code	Description	Price (\$)
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ICD-9 Codes to Convert Find Diagnosis codes

#	Code	Description
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Include note in EDI Billing: Custom NTE EDI Billing Note (a.k.a. HCFA/CMS-1500 Line 19)

Delete Save & Close Save Cancel

CPT and HCPCS Codes Find CPT/HCPCS codes

Type	Code	Description	Price (\$)
CPT	1 99213	OFFICE O/P EST LOW 20 MIN	96.55

Modifiers: 25: --- --- --- ---

Quantity/Minutes: 1.00

Diagnosis Pointers: 1:0:0:0

NDC Codes Find NDC Codes

NDC Code	Quantity	Units	Line Item
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- A separate window will open where you can process the patient's payment. The Payment Date, Appointment, and Provider should automatically populate based on the information from the patient appointment you selected.
- Select "DrChrono Payments" from the Payment Method drop-down.

New Cash

Payment Date

Appointment

Line Item

Provider

Payment Method DrChrono Payments

Type Credit

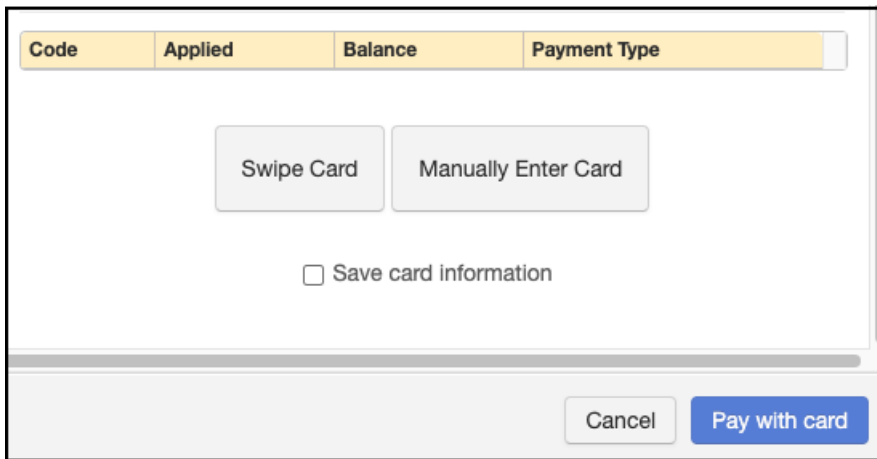
Notes

Amount \$

Code	Applied	Balance	Payment Type
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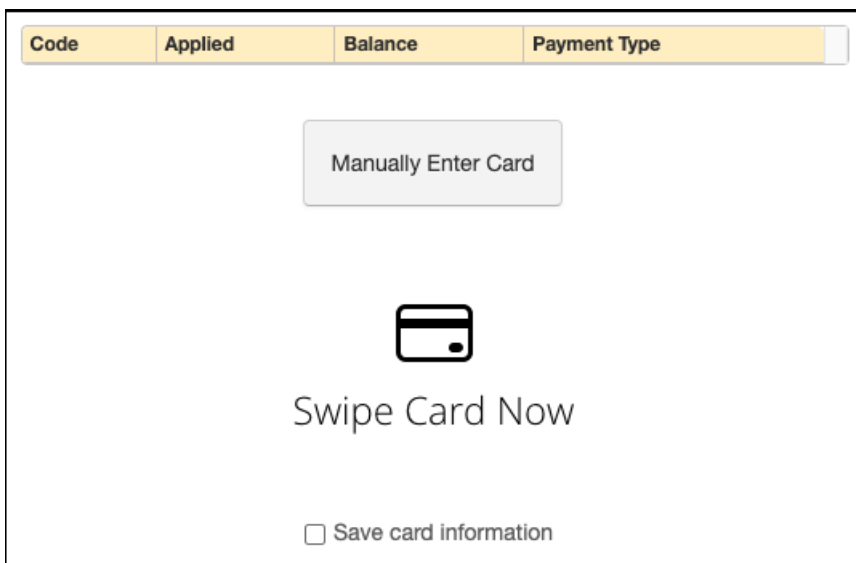
Cancel Pay with card

- 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.



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

Swipe Card -



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.
