DrChrono Payments: Processing a patient payment on the iPad

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You can process patient payments on the go by utilizing your iPad.

1. Log into your DrChrono account



2. Pull up the patient's appointment, scroll down, and press Add under the Billing Details section.

9:41 6	all 🗢 🗖					
< Back	€ ≛≣					
Appointment Details						
Exam Room	Exam 1 >					
Provider	>					
Billing Type	ICD-10 >					
Appointment Notes						
Billing Details						
Payment Profile	Cash >					
Billing Status	>					
Со-рау	1					
Total Payment	\$4.00 Add					
Patient Flags (1)						
Test flag	Test					
Contact Information						
Cell Phone						
Patient Address						
Appointments Patients Messages	Taska More					

3. If "Pay with DrChrono Payments" is not showing, simply press the word describing the payment type on the payment method line. It will give you a listing where you can select it.

Cancel	Pay with DrChrono
	\$150
Payment Method	DrChrono Payments
Line Item	None
Payment Date	
NOTES	

- 4. Enter the payment/charge amount on the top line where the \$150 shows. Also on this screen, you can specify a line item for the payment to apply to, insert a payment date, and add any notes regarding the payment.
- 5. Proceed with the payment, click on Pay with DrChrono Payments. You may see this screen as your device is connecting to your reader.



6. Once your reader is connected, you will see this screen. If the payment amount is correct, press Charge on the top right to begin the process.

4:22 PM Mon Dec 5			후 100%
Cancel			Pay with DrChrono
JENNY (JEN) HARRIS	Cancel	Charge	
			\$150
Payment Method	\$150.00		DrChrono Payments
Line Item			None
Payment Date	Reader Connected (j)		12/05/2022
NOTES	Tap the Charge button to start the transaction.		
Consultation fees			
	OTHER PAYMENT OPTIONS		
	Card on File	>	
	Credit Card	>	

7. If the patient's credit card information is on file, you can select that option. If you want to enter the information manually, press **Credit Card**. The screen below will open so you can enter it. An option at the bottom of the screen will allow you to save the card information if desired.

2 PM Mon Dec 5			奈 100%∎
Cancel			Pay with DrChrono
	<	Charge \$150.00	
	Cardholder Name *		\$150
Payment Method	Cardholder Name		DrChrono Payment
ine Item	Credit Card *		Nor
Payment Date	Key enter credit card		
IOTES	Expiration *		
Consultation fees	mm/yy		
	Security Code *		
	cw		
	Zip/Postal Code *		
	12345	/	
	Save card information		

8. The screen will then instruct you to insert, swipe, or tap the patient's credit card.



9. Once the transaction has been processed, you will receive confirmation. The patient's card will be charged and the payment will reflect on the appointment you specified.

Cancel		Charge				
Transaction Successful						
\bigcirc						
Trans	action Logging Succes	sful				

10. If you have the patient insert, swipe, or tap their credit card on an office iPad, they will see this screen:



The payment will be reflected under Billing > Patient Payments. The payment method will show as "PSMP" and the amount charged will be reflected under the amount column.

Total Paid		Allocated Pag	Allocated Payment (Paid to Appt) Unallocated Payment		Statement Balance			Total Balance							
			\$113.00		\$0.00	\$113.00		\$1,050.00			\$937.00		C Auto Fill		
Print/Export															
		#		Unallocated	Posted Date	Payment Date	Appointment	Line Item	Payme	ent Method	Туре	Notes	Amount	Total	
•		0		\$50.00	Oct 11, 2022	Oct 11, 2022	10/11/2022 11:00AM	л	PSMP		Credit	0	\$50.00		