

Patient Receipts and Superbills

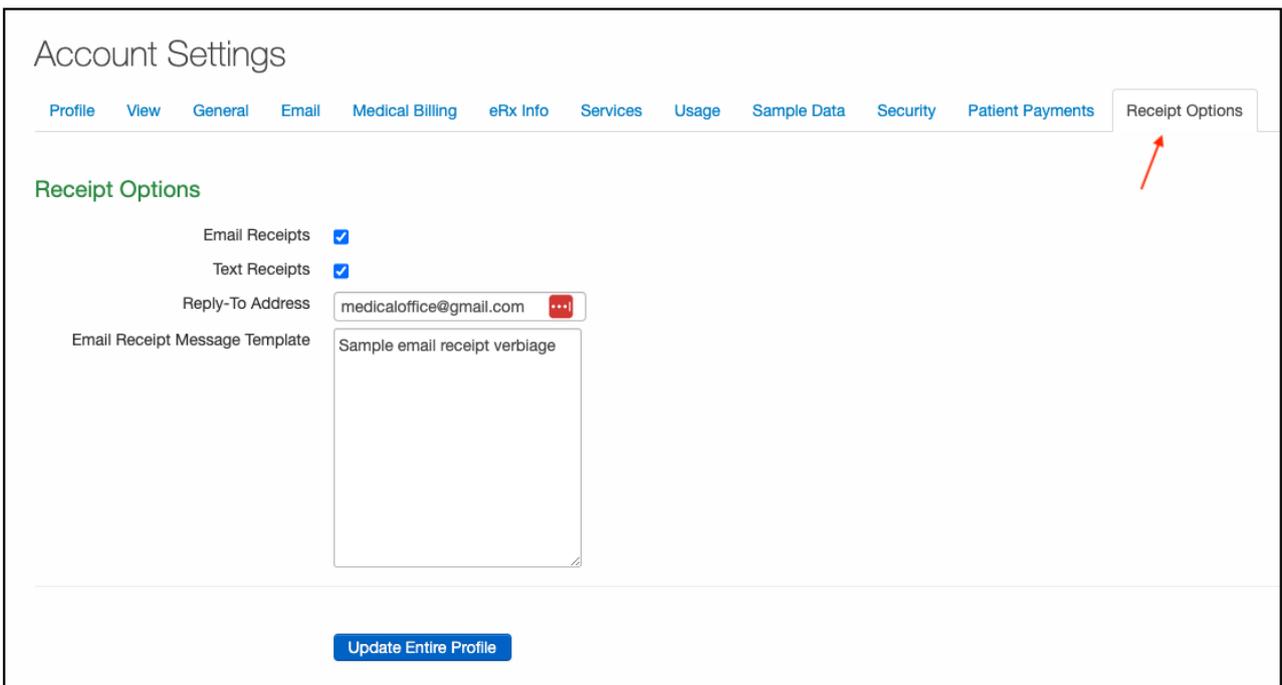
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DrChrono has two ways you can provide a receipt for payment to your patient: a receipt and a superbill. Both of these options are available in the calendar view as well as the billing screens. Each document is the same, no matter where you access it. We offer options to email, text, or print each document.

Receipt Option Setup

The account will need to be set up with the options you would like to be available in your office.

1. Navigate to Billing > Provider Settings > Receipt Options
2. Select which options (email and/or fax) you would like made available for your account.
 - a. **Print Receipt** - will show you a preview of the receipt and allow the option to print the document on a local printer
 - b. **Email Receipt** - will email a receipt to the email address listed on the patient's chart
 - c. **Text Receipt** - will text a receipt to the cell phone listed on the patient's chart.
3. Enter a Reply-to Address, if applicable.
4. Enter a message to be printed on each receipt, if applicable.
5. Once entered, press Update Entire Profile.



The screenshot displays the 'Account Settings' interface. At the top, a navigation bar includes links for Profile, View, General, Email, Medical Billing, eRx Info, Services, Usage, Sample Data, Security, Patient Payments, and Receipt Options. The 'Receipt Options' tab is selected and highlighted with a red arrow. Below the navigation bar, the 'Receipt Options' section is visible. It contains the following settings:

- Email Receipts**:
- Text Receipts**:
- Reply-To Address**: A text input field containing 'medicaloffice@gmail.com' with a red 'x' icon to its right.
- Email Receipt Message Template**: A text area containing the text 'Sample email receipt verbiage'.

At the bottom of the form, there is a blue button labeled 'Update Entire Profile'.

Patient Receipt

This is a document that lists the patient's name, the amount paid, and the date the payment was made. It does not describe or specify what the payment is for.

Patient Payment Screen

1. Navigate to **Billing > Patient Payments**
2. The receipt can be generated by pressing on the word "receipt" included in the red box on the right.

The screenshot shows the 'Patient Payments' interface. At the top, there are tabs for 'Payments', 'Line Items', 'Logs', 'Statements', and 'Balance'. Below the tabs are search filters for 'From', 'To', 'Filter by Range', and 'Provider'. There are also toggle buttons for 'Simple', 'Condensed', and 'Internal'. An 'Update' button is on the right.

	Total Paid	Allocated Payment (Paid to Appt)	Unallocated Payment	Statement Balance	Total Balance	
Jenny Harris	\$175.00	\$0.00	\$175.00	\$100.00	-\$75.00	Auto Fill

Below the summary table is a 'Print/Export' section with a '+ Add' button. The main table below has columns: #, Unallocated, Posted Date, Payment Date, Appointment, Line Item, Provider, Payment Method, Type, Notes, Amount, Total. A red arrow points to a 'Receipt' button in the 'Total' column of the first row.

Legend: | - Unallocated | - Fully Allocated |

Patient Appointment Screen

1. Navigate to **Calendar > Patient Appointment**
2. To accept a patient payment from the appointment window, press the blue plus sign.

The screenshot shows the 'Schedule Appointment' window with the 'Billing' tab selected. It includes various fields for patient information and insurance. A red arrow points to a blue plus sign next to the 'Patient Payment' field, which is currently set to '\$ 0'.

HCFA Box 10 - Is patient's condition related to:

- Employment: No
- Auto Accident: No
- Other Accident: No

Onset Date Type: Onset of Current Symptoms

Other Date Type: - Other Date Type -

3. The payment screen that opens will allow you to select an email or texted receipt.

New Cash [X]

Payment Date

Appointment

Line Item

Provider

Payment Method

Type

Notes

Amount \$

Receipt

Email Receipt

Text Receipt

Cancel Pay with card

Patient Superbill

If the patient wants a more detailed receipt, you can use the [Superbill](#) option. This receipt will include a description of services rendered/products purchased and their respective prices.

Live Claims Feed

1. Navigate to **Billing > Live Claims Feed**
2. Inside the patient's appointment, select **SuperBill**.



Patient Appointment Screen

1. Navigate to **Calendar > Patient Appointment > Billing Tab**
2. Select **Patient Superbill**

