

Manage Account Settings: Patient Payments

Last modified on 07/02/2026 8:49 pm EDT

[General](#) | [DrChrono Payments](#) | [OnPatient](#) | [Auto Allocations](#) | [Payment Plan Settings](#)

The **Patient Payments** tab in **Account Settings** controls how your practice collects and manages patient payments. Use these settings to require a patient balance before payment, connect a payment processor, accept payments through OnPatient, and configure how payments are applied to appointment line items.

Go to the Patient Payments tab

Select **Account** > **Account Settings** > **Patient Payments**.

General

When the **Require balance** setting is selected, a patient must have an outstanding balance before they can make a credit card payment online.

DrChrono Payments

DrChrono Payments is DrChrono's integrated payment processor for collecting credit card payments from patients. You can connect one or more merchant accounts to your practice.

[? DrChrono Payments: How to Set Up Your Account](#)

OnPatient

These settings control whether patients can pay through the OnPatient portal and how those payments are processed. To accept payments through OnPatient, you must turn on the **Allow OnPatient payments** setting, select a payment processor, and set a minimum payment amount.

Setting	Description
Allow onpatient payments	Patients with an OnPatient account can make payments through the patient portal.
onpatient payment default	Select the payment processor used for OnPatient payments. DrChrono Payments is the default option.
Minimum onpatient payments	Enter the minimum dollar amount a patient can submit through OnPatient.

[? Enabling Patient Payments in OnPatient](#)

Auto allocations

Auto-allocation automatically applies patient payments to open appointment line items, reducing the need for manual payment posting.

Setting	Description
Auto Allocate	Payments are automatically applied to open line items when a patient balance is available.
Auto un-allocate	Overpaid line items are automatically unallocated.

Setting	Description
Use other appointment payments	Payments set aside for other appointments are included during allocation.

[? Patient Payments Auto Allocation FAQ](#)

Payment Plan Settings

[? Patient Payment Plans: Setting up your DrChrono account to accept patient payment plans](#)
