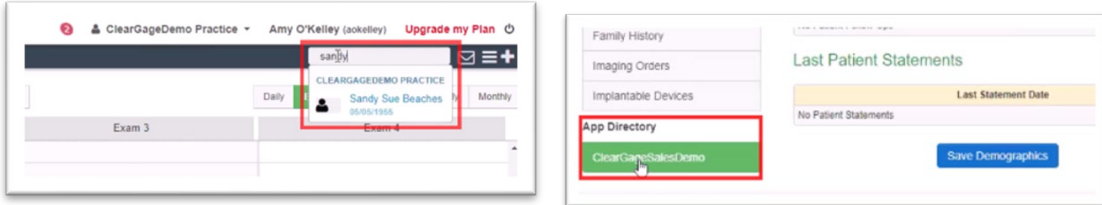


DrChrono - Editing a payment plan

If a patient does not want to make a payment using the ClearGage patient portal, the practice can assist with taking the payment.

1. Locate the patient in DrChrono and Click the ClearGage App directory button to launch ClearGage.



2. Select Payment Plans

Patient Details

- Patient History
- Patient Information
- Patient Relationships
- Payment Profiles
- Payment Plans**
- Documents
- Statements
- Patient Consents
- Alternate Contact Information
- Export Patient Data

Patient History (Click on column headers to re-sort)

Date	Plan ID	Event	Status	Debit Amt.
09/09/2021 11:39 AM	A6M588V1	Payment Plan Setup		
09/09/2021 11:39 AM	A6M588V1	Plan Payment	Approved	\$150.00
09/09/2021 11:39 AM	A6M588V1	Payment Plan Pending		
09/09/2021 11:39 AM		Payment profile created		
07/08/2021 10:32 AM		Other Payment	Approved	\$45.00
04/14/2021 02:18 PM	A6M588V1	QuickPay link texted to 9685555555 for balance of \$1,500.00		
04/14/2021 02:18 PM	A6M588V1	QuickPay link emailed to Buchanan_flower@email.zzz for balance of \$1,500.00		
04/14/2021 02:18 PM	A6M588V1	Payment Plan Pending		
04/14/2021 02:18 PM	A6M588V1	Payment Plan Pending		
04/14/2021 01:28 PM	A6M588V1	Payment Plan Pending		
04/14/2021 01:14 PM	A6M588V1	Payment Plan Pending		

3. Select the Active plan

Payment Plans

Plan ID	Plan Name	Plan Type	Plan Status	Payment Amount	Current Balance
6M0BVI57-A6M588V1	-	AR Payment Plan	Active	\$123.77	\$1,350.00

Once on the payment agreement screen, you can edit:

- A. The payment amount
- B. The payment method
- C. The payment schedule options

Encounter Balance	\$1,500.00
Adjustment [History]	\$
Setup Fee	\$0.00
Plan Amount	\$1,500.00
Payments To Date [History]	\$150.00
Remaining Balance	\$1,350.00
Payment Option	Payment Plan
Payment Frequency *	Monthly
Payment Amount	\$ 123.77
Interest Rate	% 18.00
Remaining Payments	12
Total Payment w/ Interest	\$1,485.21

Status *	Active	
Payment Method *	VISA/Credit - 1111	
Alt. Payment Method		
Payment Schedule Options		
Day of the Month	14	
Most Recent Payment	09/09/2021	\$150.00
Next Scheduled Payment	10/14/2021	\$123.77
Portal Eligible	<input checked="" type="radio"/> Yes <input type="radio"/> No	

4. Make your desired changes and Select Save

Payment Option	Payment Plan
Payment Frequency *	Monthly
Payment Amount	\$ 123.77
Interest Rate	% 18.00
Remaining Payments	12
Total Payment w/ Interest	\$1,485.21

Most Recent Payment	09/09/2021	\$150.00
Next Scheduled Payment	10/14/2021	\$123.77
Portal Eligible	<input checked="" type="radio"/> Yes <input type="radio"/> No	

5. Add a detailed memo and click save

Add Memo

Event Type *
Memo

Memo Note * (95/4,000 Characters)
Added the patient's checking account and changed the payment date to the last day of the month.

The payment plan settings are now changed and saved.