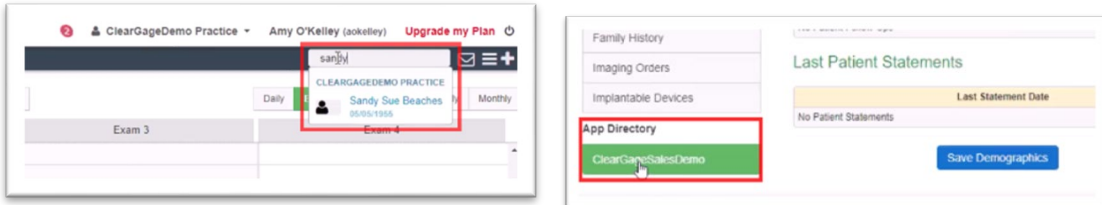


DrChrono - Scheduling a One-time payment

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. Make sure you have an imported balance from DrChrono

Patient History (Click on column headers to re-sort) Export Filter: All Memos

Date	Plan ID	Event	Status	Debit Amt.	Credit Amt.	User
08/12/2021 10:02 AM	-	Imported new balance from DrChrono.	-	-	-	System
08/10/2021 12:05 PM	A82EJRPS	Payment Plan Status Changed to Closed	-	-	-	DrChrono: aokelley
08/10/2021 12:05 PM	A82EJRPS	Plan Payment	Approved	\$2,249.50		DrChrono: aokelley
08/10/2021 11:43 AM	A82EJRPS	Payment Plan Setup				System

3. Select Payment Plans

Patient Details

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

Patient History (Click on column headers to re-sort) Export Filter: All Memos

Date	Plan ID	Event	Status	Debit Amt.	Credit Amt.	User
08/12/2021 10:02 AM	-	Imported new balance from DrChrono.				System
08/10/2021 12:05 PM	A82EJRPS	Payment Plan Status Changed to Closed				DrChrono: aokelley
08/10/2021 12:05 PM	A82EJRPS	Plan Payment	Approved	\$2,249.50		DrChrono: aokelley
08/10/2021 11:43 AM	A82EJRPS	Payment Plan Setup				System
08/10/2021 11:43 AM	A82EJRPS	Payment Plan Setup	Approved	\$1,000.00		Patient Portal
08/10/2021 10:57 AM	A82EJRPS	QuickPay link texted to 8137735074 for balance of \$3,249.50				DrChrono: aokelley
08/10/2021 10:57 AM	A82EJRPS	QuickPay link emailed to amy.okelley@cleargage.com for balance of \$3,249.50				DrChrono: aokelley
08/10/2021 10:57 AM	A82EJRPS	Payment Plan Pending				DrChrono: aokelley
07/30/2021 04:23 PM		Imported new balance from DrChrono.				System
07/30/2021 04:13 PM		Imported new balance from DrChrono.				System
07/30/2021 04:09 PM		Other Payment	Approved	\$3,124.50		DrChrono: aokelley
07/30/2021 04:09 PM	A82EJRPS	Payment Plan Status Changed to Closed				DrChrono: aokelley

4. Select the Dormant Plan

Payment Plans

Plan ID	Plan Name	Plan Type	Plan Status	Payment Amount	Current Balance
6KFA40R3-A7N8R7HN		AR	Dormant		\$500.00
6KFA40R3-A82EJRPS		AR Payment Plan	Closed		\$0.00
6KFA40R3-A4KU52DD		AR	Closed		\$0.00
6KFA40R3-A6B8FQBN		AR	Closed		\$0.00

5. On the payment agreement page, select One-Time Payment for the payment option.

Encounter Balance \$500.00
 Discount \$ 0.00
 Balance Due \$500.00

Payment Method
 Alt. Payment Method

Payment Option
 Remaining Balance

One Time Payment
 Payment Plan

6. Select Paid On for the Payment date

Encounter Balance \$500.00
Discount \$ 0.00
Balance Due \$500.00
Payment Option One Time Payment
Payment Date [Dropdown: Paid Today, Paid On]
Payment Amount

Payment Method * [Dropdown]
Alt. Payment Method [Dropdown]

7. Select the Date for the payment

Encounter Balance \$500.00
Discount \$ 0.00
Balance Due \$500.00
Payment Option One Time Payment
Payment Date [Dropdown: Paid On] [Calendar: August 2021]
Payment Amount

Remaining Balance

SAVE CHANGES ACTIVATE SEND TO PATIENT

8. Select an existing payment method, or enter a new payment method

Encounter Balance \$500.00
Discount \$ 0.00
Balance Due \$500.00
Payment Option One Time Payment
Payment Date [Dropdown: Paid On] 08/20/2021
Payment Amount \$ 500.00
Remaining Balance \$0.00

Payment Method * [Dropdown: Patient Existing Payment Methods, New Payment Method]
Alt. Payment Method [Dropdown]

9. Select Save & Activate

Note: If you only select Save Changes the plan will remain dormant, and your payment will not be scheduled. You must select Save & Activate

SAVE CHANGES **SAVE & ACTIVATE** SEND TO PATIENT

If the payment agreement terms pop up electronically, and the patient is in the office, they can check the boxes. If not, you can always continue without electronic signatures.

Payment Agreement Terms [CANCEL]

Molly Barks
Care Plan Balance: \$4,716.65

PAYMENT PLAN AGREEMENT

This Payment Plan Agreement - Plan ID# 7R2ERAV8-A4VU6NVF ("Payment Plan Agreement") is between Dr Chrono Test Client 1 and Molly Barks and is effective August 13, 2024 (Effective Date)

Continue Without Electronic Signatures

As soon as the payment is processed you will see the payment posted to the line item in DrChrono.

