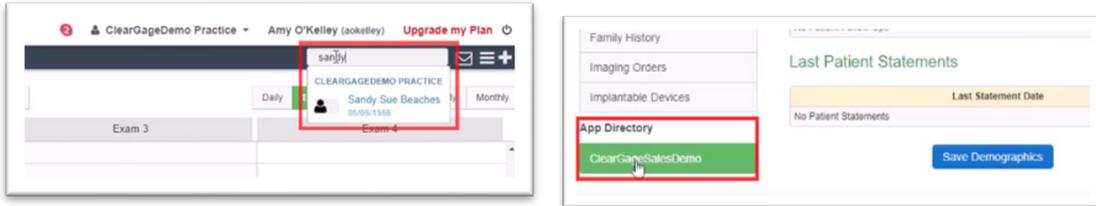


DrChrono – Setting up a payment plan

For patients with larger balances – ClearGage gives you the flexibility to set up a payment plan for that patient so you can collect on the balance over a defined period. The scheduled payments are automatically drafted from patient’s preferred payment method on a specific day each month.

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 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

4. On the Payment agreement screen, select Payment Plan as the Payment Option

Payment Agreement Print Agreement

Encounter Balance	\$3,716.65	Payment Method*	<input type="text"/>
Discount	\$ 0.00	Alt. Payment Method	<input type="text"/>
Adjustments to Date	\$1,000.00		
Balance Due	\$4,716.65		
Payment Option	<input type="text"/>		
Remaining Balance			

5. Select Show Table

Payment Agreement Print Agreement

Encounter Balance \$3,716.65
 Discount \$ 0.00
 Adjustments to Date \$1,000.00
 Balance Due \$4,716.65

Payment Method*
 Alt. Payment Method

Payment Option
 Remaining Balance

One Time Payment
 Payment Plan

6. Select the term and click Save

Note: Work with the patient to determine what they can pay per month based on their budget. Also determine if a Down Payment will be processed today.

Payment Terms PRINT SAVE CANCEL

Molly Barks Patient View Override Payment Terms
 Care Plan Balance: \$4,716.65

Display for Patient/Print:

Plan Term (months):	Prepay	3	6	9	12	18	24
Discount: %	0.00	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Discount \$:	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Down Payment:	100%	15.00%	15.00%	15.00%	15.00%	15.00%	15.00%
Interest Rate:	-	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Total Initial Payment:	\$4,716.65	\$707.50	\$707.50	\$707.50	\$707.50	\$707.50	\$707.50
Total Monthly Payment:	-	\$1,336.38	\$668.19	\$445.46	\$334.10	\$222.73	\$167.05
Down Payment \$:	\$4,716.65	\$707.50	\$707.50	\$707.50	\$707.50	\$707.50	\$707.50
Total Interest \$:	-	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total Collected \$:	\$4,716.65	\$4,716.65	\$4,716.65	\$4,716.65	\$4,716.65	\$4,716.65	\$4,716.65

Select Term:

7. Select the payment method or add a new payment method

Payment Agreement Print Agreement

Encounter Balance \$3,716.65
 Discount \$ 0.00
 Adjustments to Date \$1,000.00
 Balance Due \$4,716.65

Payment Option
 Payment Terms [Show Table](#) 9 Mo - 15% Down
 Plan Setup Fee \$ 0.00

Minimum Amount Due Today \$0.00
 Additional Amount Paid Today \$ 707.50
 Total Amount Paid Today \$707.50

Remaining Balance \$4,009.15
 Payment Frequency Monthly
 Payment Amount \$ 445.46
 Interest Rate % 0.00
 APR 0.00%
 Total Number of Payments 9

Payment Method*
 Alt. Payment Method

Payment Schedule Options
 Day of the Month
 First Payment Due Date

Campaign Eligible Yes No
 Portal Eligible Yes No

Patient Existing Payment Methods
 MC/Credit - 5454
 Checking - 2132
 VISA/Credit - 1111
 New Payment Method
 Credit/Debit
 Checking/Savings

Select the Day of the month.

Payment Agreement Print Agreement

Encounter Balance	\$3,716.65	Payment Method	VISA/Credit - 1111
Discount	\$ 0.00	Alt. Payment Method	
Adjustments to Date	\$1,000.00	Payment Schedule Options	
Balance Due	\$4,716.65	Day of the Month	15
Payment Option	Payment Plan	First Payment Due Date	09/15/2021
Payment Terms	Show Table 9 Mo - 15% Down		

8. Select Save & Activate

Note: If you only select Save Changes the plan will remain dormant. You must select Save & Activate

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 Continue Without Electronic Signatures

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, 2021 ("Effective Date").

9. Verify and submit the payment information by clicking Submit

Note: This is when you will process the down payment

Please verify the following information is correct before pressing Submit.

Payment Information						
Patient Name	Amount	Payment Method	Card Type	Name on Card	Card Number	Exp. Date
Molly Barks	\$707.50	Credit/Debit Card	Visa	Molly Barks	Ending in 1111	04/2022
Patient ID	Plan ID	Txn. Type	Notes			
87641279	7R2ERAV8-A4VU6NVF	Plan Payment	\$707.50 Plan Balance Payment			

You will receive a payment plan confirmation. From here you can print the agreement and/or print a payment receipt.

Add Payment Plan - Confirmation

The following payment plan was created
7R2ERAV8-A4VU6NVF

The patient now has an active payment plan.