Pacific Psychology & Comprehensive Health Clinic
MyChart URL:
https://mychart.ochin.org/mychart/Authentication/Login?

2. Click the **Billing** button from the toolbar.

    a. Click **Account Summary.**
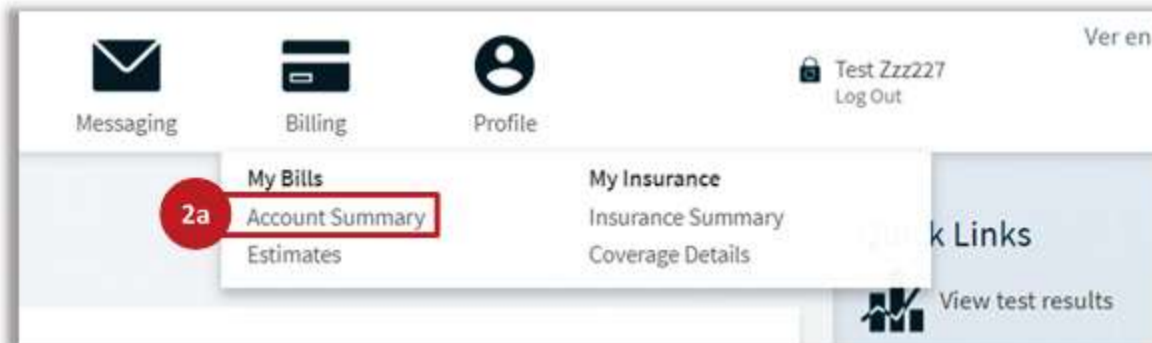


3. The billing account summary page opens and display the patient's outstanding self-pay balance. Click the **Set up Payment Plan** hyperlink (the minimum amount due each month will display below the payment plan option).
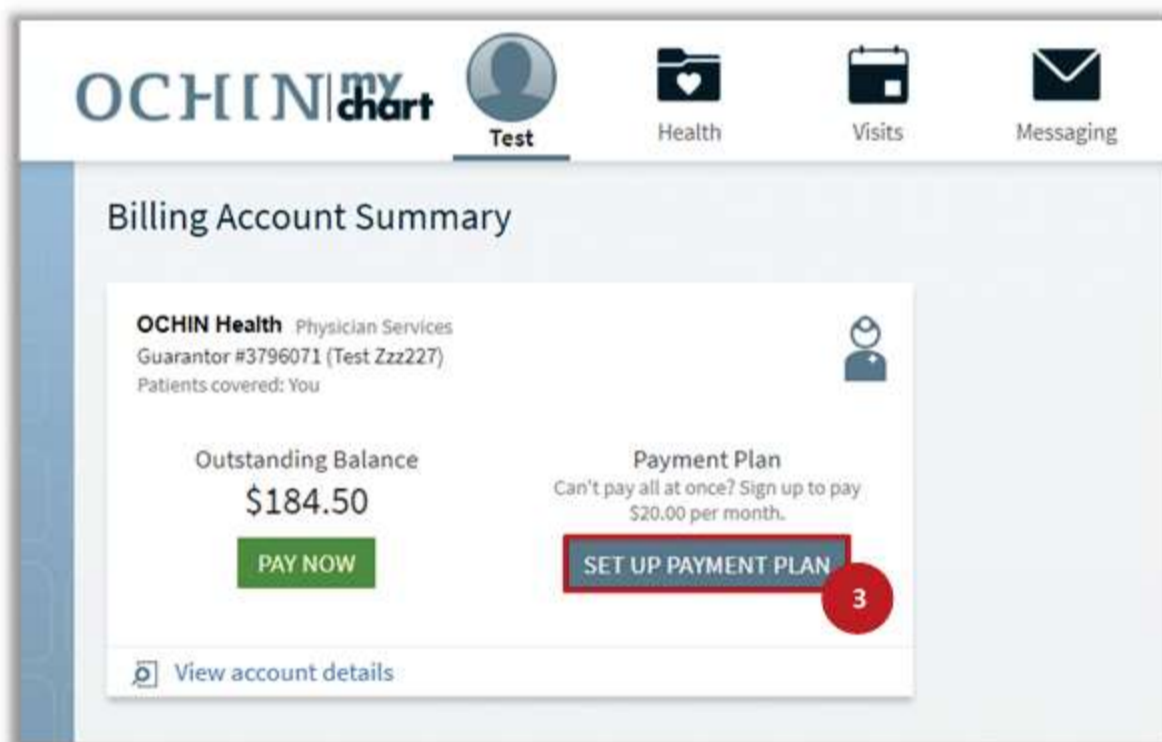


The minimum monthly amount due is determined by maximum number of payments, minimum monthly amount, minimum balance and/or maximum balance.

4. The Payment Plan Sign Up activity opens.

    a. Enter the desired **monthly amount** (the box is pre-populated with the minimum monthly payment amount).

    b. Select the **day of the month** that you'd like your payments to be made (the box is pre-populated with the 15th of each month).

    c. The sentence below will provide information on the **total number of months** it will take to pay the outstanding balance on account.

    d. Click **Next**.

5. Select a payment method.

    a. If an existing card is selected, click **Next**, or;

    b. Click **Add Payment Method** to add a new credit card.



6. For a new credit card, enter the required and relevant payment information.

    a. Click **Save Payment Method**

    b. You'll return to the payment method selection screen. Select the appropriate card and click **Next**.



> If the patient tries to enter monthly payment information that does fall within the parameters set by your SA, they will receive the following warning:
>
> **The monthly payment you entered is too low for your outstanding balance.**
> It has been automatically adjusted to the minimum allowed amount.

> If the credit card information on file has expired or will expire prior to payment plan completion they will receive the following warning:
>
> **Your selected credit card will expire before your plan is completed.**
> You will need to add or choose a new payment method before your selected card expires. We'll notify you electronically when your selected card is about to expire.
>
> If the patient has email notifications turned on they will receive an email reminder two months before card expiration date.

7. Review the payment plan information and click **Start Plan**.

8. If the payment plan was configured successfully, the page will display the monthly payment amount, total number of payments, day of month for each payment, and credit card selected for your records.



# Patient Workflow: Cancel Payment Plan⬆

Patients can no longer terminate their payment plan from their MyChart account. Patients must contact the SA to remove the auto-payment method from their guarantor account.

# Patient Workflow: Update Payment Plan⬆

Patients have the option to change the amount of their monthly payment plan anytime they want as long as the amount is within the minimum monthly amount of your SA.

The patient's MyChart account:

1. Click the **Billing** button from the toolbar.

    a.  Click **Account Summary.**
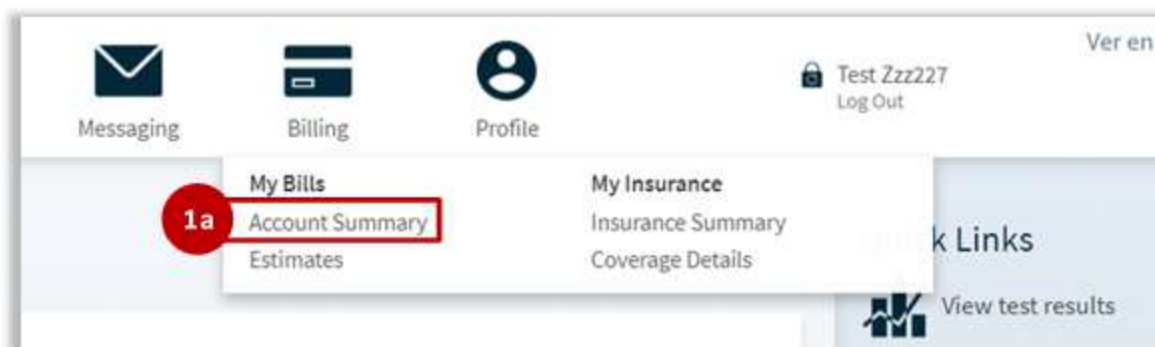


2. The billing account summary page opens and display the patient's outstanding self-pay balance and auto pay details.

    a. Click the **Manage payment plan** hyperlink.

3. The patient has the option to update:

   a. The monthly payment amount,

   b. The date of the month the payment is made, and/or

   c. The payment method.

   d. Click **Next** after each change.





4. Review the payment plan information and click **Update Plan**.