

Processing Square Payments through DrChrono EHR

Last modified on 03/10/2025 9:50 am EDT

Patient credit card payments can be processed through DrChrono's Square integration on the web platform. You can easily enter card information to take payments and save a card on file for later use.

Entering Payment Information

1. Open an appointment and go to the **Billing** tab

Schedule Appointment

Appointment **Billing** Eligibility Vitals Growthcharts Flags Log Comm. Revisions Custom Data MU Helper

Patient SuperBill Clinical Note Billing Details Other Forms

Billing Status ICD Version Patient Payment \$ 0 Copay: \$20 + Pre Authorization Approval Referral # Payment Profile Cash Billing Profile Billing Pick List Choose Codes from Pick List Diagnosis Pick List Choose Codes from Pt Problems Credit Card Payment **Process Credit Card**

HCFA Box 10 - Is patient's condition related to:

Employment No Auto Accident No Other Accident No Onset Date Type Onset of Current Symptoms Onset Date Other Date Type - Other Date Type - Other Date

Claim Billed: \$175.00 Adjustment: \$0.00 Insurer Paid: \$0.00 Patient Paid: \$0.00

ICD-10 Codes Find Diagnosis codes

#	Code	Description	
1	A06.5	Amebic lung abscess	x
2	A15.0	Tuberculosis of lung	x
3	C39.0	Malignant neoplasm of upper respiratory tract, part unspecified	x
4	M54.5	Low back pain	x

CPT Codes Find CPT Procedure codes

Code	Description	Price (\$)	
1 99213	OFFICE/OUTPATIENT VISIT EST	175.00	x

Modifiers: --- --- --- ---

Quantity/Minutes: 1.00

Diagnosis Pointers: 1:0:0

2. The payment window will open. Enter an **Amount** and then select the **Payment Method**.


New Cash ×

Payment Date

Appointment 8/21/2020 07:40AM (\$175.00) ▾


Line Item -Auto Allocate- ▾

Provider ▾

Payment Method Cash ▾ 

Type Credit ▾

Notes

Amount \$ 20 

Code	Applied	Balance		Payment Type
99213	\$ 20	\$175.00	P	Credit ▾

Add Cancel

3. Select **Square** as the payment method.

New Cash ×

Payment Date

Appointment 8/21/2020 07:40AM (\$175.00) ▾

Line Item -Auto Allocate- ▾

Provider ▾

Payment Method **✓** Cash ▾

Type Debit ▾

Notes

Amount

- Select Type -

- ✓ Cash
- Check
- Debit
- Credit Card
- American Express
- Visa
- Mastercard
- Discover
- Square (Legacy)**
- Patient Payments
- onpatient
- Other

Code	Applied		Payment Type
99213	\$ 20		dit ▾

Add Cancel

4. Fill out the card information. If you would like to save the card, check the **Save Card Information** box. When you are ready to process the payment, press **Pay with Card**.

New Cash ✕

Code	Applied	Balance	Payment Type
99213	\$	\$174.00	P Credit ▼

Square

Location ▼

Card Number

CVV

Expiration Date

Postal Code

Save card information ↗

Customer Notes ❗

Pay with card

Cancel

5. The payment will be processed and a receipt will be generated in the **Billing** tab.

Schedule Appointment

Appointment
Billing
Eligibility
Vitals
Grow

❗ Billing Status ▼

ICD Version ▼

Patient Payment Copay: \$20 +

↑ Receipt ▼

Pre Authorization Approval

Referral #

Payment Profile ▼

Billing Profile +

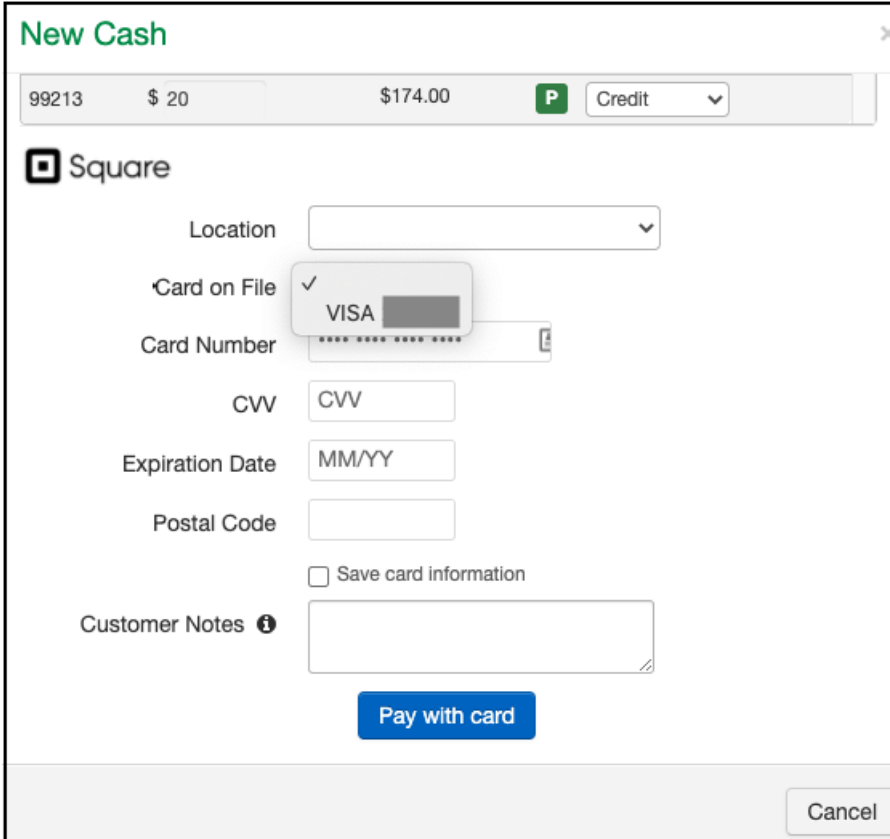
Billing Pick List

Diagnosis Pick List

Processing a Payment with a Saved Card

Following the same steps above, once you have saved a card for a patient, you will be able to process payments with the card on file.

1. Select **Card on File**.



The screenshot shows a 'New Cash' payment window. At the top, there is a header with the text 'New Cash' and a close button. Below the header, there is a summary bar containing the patient ID '99213', the amount '\$ 20', the total '\$174.00', a green 'P' icon, and a 'Credit' dropdown menu. The main section is titled 'Square' and contains several input fields: 'Location' (a dropdown menu), 'Card on File' (a dropdown menu with a checkmark and 'VISA' visible), 'Card Number' (a masked input field), 'CVV' (input field with 'CVV'), 'Expiration Date' (input field with 'MM/YY'), and 'Postal Code' (input field). There is also a checkbox for 'Save card information' and a 'Customer Notes' field with an information icon. A blue 'Pay with card' button is located at the bottom center, and a 'Cancel' button is at the bottom right.


2. After selecting the card, press **Pay with Card**.

New Cash

Type

Notes

Amount \$

Code	Applied	Balance		Payment Type
99213	\$ 20	\$174.00		<input type="text" value="Credit"/>

Square

Location

Card on File

Customer Notes 

[Pay with card](#)

[Cancel](#)