

Processing Square Payments through DrChrono EHR

Last modified on 12/09/2024 2:08 pm EST

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 and click the (



) icon.

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

ICD Version

Patient Payment \$ 0 Copay: \$20 **+**

Pre Authorization Approval

Referral #

Payment Profile

Billing Profile **+**

Billing Pick List

Diagnosis Pick List

Credit Card Payment

Employment

Auto Accident

Other Accident

Onset Date Type

Onset Date

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	✗
2	A15.0	Tuberculosis of lung	✗
3	C39.0	Malignant neoplasm of upper respiratory tract, part unspecified	✗
4	M54.5	Low back pain	✗

CPT Codes			Find CPT Procedure codes
Code	Description	Price (\$)	
1 99213	OFFICE/OUTPATIENT VISIT EST	175.00	✗
Modifiers: <input type="text" value="---"/> <input type="text" value="---"/> <input type="text" value="---"/> <input type="text" value="---"/>			
Quantity/Minutes: <input type="text" value="1.00"/>			
Diagnosis Pointers: <input type="text" value="1:0:0"/>			

2. The payment window will open. Please be sure you have an **Amount**. Then click **Payment Method**.

New Cash ✕

Payment Date: 08/21/2020

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

Line Item: -Auto Allocate- ▾

Provider: Brendan Wilberton ▾

Payment Method: Cash ▾

Type: Credit ▾

Notes:

Amount: \$ 20 ←

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

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

New Cash ✕

Payment Date: 08/21/2020

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

Line Item: -Auto Allocate- ▾

Provider: Brendan Wilberton ▾

Payment Method: Cash
 Check
 Debit
 Credit Card
 American Express
 Visa
 Mastercard
 Discover
 Square (Legacy)
 Patient Payments
 onpatient
 Other

Type: Debit
 Credit

Notes:

Amount:

Code	Applied		Payment Type
99213	\$ 20		dit ▾

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, click **Pay with Card**.

New Cash ✕

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

■ Square

Location ▼
 Brendan's DrChrono

Card Number E
 0000 0000 0000 0000

CVV E
 123

Expiration Date E
 12/24

Postal Code E
 12345

Save card information

Customer Notes i E

Pay with card

Cancel

5. The payment will process and a receipt will generate in the **Billing** tab.

Schedule Appointment

Appointment
Billing
Eligibility
Vitals
Growt

i Billing Status ▼
 Balance Due

ICD Version ▼
 ICD-10

Patient Payment +
 \$ 1.00 Copay: \$20

↑ Receipt ▼

Pre Authorization Approval E
 \$1.00 [08/20/2020]

Referral # E

Payment Profile ▼
 Cash

Billing Profile + ▼

Billing Pick List E
 Choose Codes from Pick List

Diagnosis Pick List E
 Choose Codes from Pt Problems

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.

New Cash ×

99213	\$ 20	\$174.00	P	Credit ▼
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☐ Square

Location Brendan's DrChrono ▼

Card on File ✓
VISA XXXXXXXXXX

Card Number XXXXXXXXXX

CW CVV

Expiration Date MM/YY

Postal Code

Save card information

Customer Notes ⓘ

Pay with card

Cancel

2. After selecting the card, click Pay with Card.

New Cash ×

Type Credit ▼

Notes

Amount \$ 20

Code	Applied	Balance		Payment Type
99213	\$ 20	\$174.00	P	Credit ▼

☐ Square

Location Brendan's DrChrono ▼

Card on File VISA XXXXXXXXXX

Customer Notes ⓘ

Pay with card

Cancel

